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**Outcomes of in-depth reviews carried out by the Bureau of the Conference
of European Statisticians in October 2017 and February 2018****In-depth review of emerging issues in statistical
communication****Note by the Central Statistical Office of Ireland***Summary*

The present note is an updated version of the in-depth review document on emerging issues in statistical communication that the Bureau of the Conference of European Statisticians discussed in October 2017. The note takes into account the outcome of the Bureau discussion.

The note summarises international activities related to the emerging issues in statistical communication, and identifies issues and challenges. The conclusions and recommendations from the review are presented in section VI, and the outcome of the Bureau discussion and follow up activities in sections VII and VIII.

The document is presented under two agenda items of the Conference: the seminar on "Getting our message across: Strategic reflections on modernizing statistical communication" and item 12 "Outcomes of in-depth reviews carried out by the Bureau of the Conference of European Statisticians in October 2017 and February 2018".

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I. Executive summary

1. This review provides an overview of communications initiatives and practices at national and international levels and identifies high level communications issues and challenges facing official statistics.

2. The main findings, which are based on inputs from country experiences, can be summarised as follows:

(a) **Communications environment:** Official statistics are operating in a competitive and challenging environment. Defining the role and position of National Statistics Offices (NSOs) in the post truth environment and developing a robust social media profile are essential to maintaining the relevance of official statistics;

(b) **Strategic communications:** the practice of communications is a relatively new field for many NSOs. With limited resources and in an increasingly competitive environment, however, communications can no longer be viewed as a 'nice to have' but as a 'must have'. NSOs must build internal expertise in the field of communications;

(c) **Broadening the target audience:** Modern communications facilitate communication amongst peers (both 'one to one' and 'many to many'). This has particular relevance for the world of official statistics where traditionally communications and dissemination have focussed on the expert user. There is now a growing onus on NSOs to communicate with the citizen and improve statistical literacy across all audience cohorts;

(d) **Issue management:** Effective communication strategies need to include a proactive response strategy to issues that have the potential to cause reputational damage. Issues identified include privacy / data protection, globalisation and Sustainable Development Goals.

3. Proposals for further work include establishing a high level working group to explore the role and boundaries of NSOs in the post truth era; developing a communications framework and guidance documents to support NSOs; building expertise in building brand awareness; sharing knowledge with regard to citizen focussed communications, and building expertise in the area of proactive issue management.

II. Introduction

4. The Bureau of the Conference of European Statisticians (CES) regularly reviews selected statistical areas in depth. The aim of the reviews is to improve coordination of statistical activities in the UNECE region, identify gaps or duplication of work, and address emerging issues. The review focuses on strategic issues and highlights concerns of statistical offices of both a conceptual and a coordinating nature.

5. The current paper provided the basis for the review by summarising the international statistical activities in the selected area, identifying issues and problems, and making recommendations on possible follow-up actions.

6. The CES Bureau selected emerging issues in statistical communication in February 2017 for an in-depth review. Central Statistics Ireland prepared the paper with input from Austria, Canada, Finland, Germany, UK and UNECE.

III. Scope/definition of the statistical area covered

7. For traditional users of official statistics their value and importance is undisputed. However, the environment in which official statistics operate has changed significantly over the last twenty years. Various data sets outside of official statistics are available and the digital and social media revolutions have meant that more and more people have access to data than ever before.

8. An effective communications strategy is now essential for maintaining the relevance of official statistics in this increasingly competitive environment.

9. However, the concept of a strategic approach to communications of official statistics is a relatively new concept for most NSOs who have traditionally focussed more effort on dissemination practices.

10. While there is overlap between the practices of dissemination and communications there are significant differences between the two. Dissemination can be described as putting information out into the world in a planned fashion to as wide an audience as possible. Communications, on the other hand, is essentially about 'creating understanding' by targeting and messaging key audiences. It involves:

- tailoring and framing messages to suit particular audience cohorts;
- designing tools and channels that suit particular audience's needs;
- audience engagement initiatives and outreach programmes;
- customer consultation;
- media relations programmes;
- creating issue management response protocols; and
- measuring the results and impact of the communications.

11. In some NSOs communication is given little attention or is seen as a low priority. In others, however, it is growing in importance as many NSOs are realising the value of effective communications with regard to maintaining and enhancing the relevance of official statistics in society to as broad an audience as possible.

12. In recognition of the increasing importance of communications in today's data rich world, the aim of this in-depth review is to consider the following:

- work undertaken to date in the area of communications;
- emerging issues and challenges with regard to the communication of official statistics; and
- recommendations for future work.

IV. Overview of international statistical activities in the area

13. This section provides a brief overview of current activities in the communication of official statistics.

A. International activities related to communication

1. UNECE Workshop on Statistical Data Dissemination and Communication

14. The annual UNECE Workshops on Statistical Data Dissemination and Communication provide a forum for the community of people working in the fields of communication and dissemination of statistics in national and international statistical institutes to share knowledge, experience, ideas and resources. Each year the workshop

focuses on cutting edge ideas, new trends, experiments and approaches in the areas of data dissemination and communication. The Steering Committee of the Workshop has, in previous years, produced publications such as the "Making Data Meaningful" series.

2. Telling stories with SDG data Hackathon (5 -7 September 2017)

15. Effective communication is essential for maintaining the relevance of official statistics and maximising their value to society. Increasingly, users want answers to questions based on data. Statistical organisations can produce statistics that are more effective and can add value to products by putting the data in context and telling the broader stories based on the available facts. The hackathon is an intensive problem-solving event focussed on statistical content and in particular, effective communication. Multidisciplinary teams were challenged to "Create a user-oriented product that tells a fact based story about the younger population" within the three day timeframe. The hackathon was organized by UNECE.

3. OECD Conference on providing facts where opinions are formed: The role of official statistics in an evolving communication society (5 – 6 October 2017)

16. Official statistics should be perceived as an anchor of serious and factual information. Opinions should be formed on the basis of facts and figures and not emerge from deliberate and biased information. If official statistics are to remain relevant, they must be present on social media to provide the factual statistical information needed. This conference, organized by the OECD, will address the challenges of remaining relevant in a rapidly-evolving world and help NSOs and international organizations develop new communication strategies.

B. European Statistical System initiatives

17. The project for Digital Communication, User Analytics and Innovative Products (DIGICOM) is one of the eight projects from the European Statistical System (ESS) Vision 2020 portfolio. DIGICOM consists of four packages that run in parallel between 2016-2019:

- User analysis
- Innovative and shareable products and tools
- Open data dissemination
- Communication and promotion

18. The project aims to modernise communication and dissemination of European statistics. It is envisaged that this will be achieved by exploring and developing innovative dissemination products and services based on experiences within the ESS and the needs of European statistics users.

19. The project explores the following questions: How can NSOs better engage with users? What kind of new products and services does the user community expect? How should official statistics be communicated, in order to differentiate it from competing products and services? and How can NSOs seize the opportunities offered by recent technologies such as visualisation tools, user analytics and the semantic web?

20. A total of 18 NSOs are involved in the implementation of the DIGICOM project. A significant outcome of the project includes the collaborative networks that NSO staff establish as they work together and exchange practices.

C. Country practices

21. The countries that contributed to this paper provided details of their organisation's approach to communications. Annex 1 sets out a number of such examples.

IV. Issues and challenges

22. Following consultation with the NSOs who contributed to this paper, a number of high level communications related issues and challenges facing official statistics were identified. For the purposes of this paper these are addressed in this section under the following headings:

- Communications environment
- Strategic communications
- Broadening the audience
- Issue management

A. Communications environment

23. Since websites first went online over 25 years ago, the world has moved from the printed page, where information was delivered in stable fixed formats, to an open fluid digital environment where it is easier to publish than ever before. The downside of this evolution is that contradictory or false information can also be quickly shared and holding purveyors of falsehoods to account is increasingly difficult. However, this does not mean that facts have lost their value. They matter now more than ever. The section below explores some of the issues associated with communicating in this environment for NSOs, namely the post truth phenomenon and social media.

1. Post truth phenomenon

24. Historically, society has turned to facts or official statistics to settle debate. However, facts seem to be losing their ability to support consensus and there is no longer a single source of truth.

25. In this post truth era, social media platforms are further empowering change by providing wider and faster connectivity across a larger, and often previously untapped, audience cohort. A very different style of communicating content has emerged, one which empowers the individual, demands a shorter attention span and one where images and sound bites are preferred. Furthermore, the convergence of social media and the data revolution with movements such as populism has given rise to an environment where a myriad of truths can coexist unchecked and where leaders can establish support.

26. This environment poses a number of strategic communications challenges for NSOs such as: What is the role of a statistical office in the world of "alternative facts" and misuse of official statistics? What are the boundaries for NSOs? and What steps should NSOs take to control and protect our data and our message?

2. Social media

27. Social media has driven social change and citizens around the world are continuing to access information and express their opinions towards issues that surround them.

28. One of the challenges associated with social media is the 'filter bubble' or 'echo chamber' effect. Individuals can choose to reinforce their worldviews and exclude other views by inhabiting only segregated like-minded communities.

29. A means of counterbalancing this is to understand why certain audiences prefer a certain viewpoint. For example, members of the public may feel alienated from the official facts when they do not identify with metrics produced about the economy. Learning to understand the root of audience perspectives and create an authoritative, relevant and responsive social media profile is a key challenge for NSOs.

30. It is also important to understand that social media is not limited to networking websites such as Facebook and Twitter. It also includes all the services that enable the creation, sharing and exchange of user generated content. Each type of social media platform attracts a different audience profile. Sometimes the most popular websites may not serve an individual business' needs and it is important to select platforms appropriately.

31. The challenge for official statistics also involves understanding which style of communication works best in a given social media platform, and developing suitable messaging campaigns, which do not over simplify complex information, yet are tangible, understandable and relevant to the target audience. This involves developing new ways of communicating statistical outputs centred on compelling, and engaging content, headlines and posts.

B. Strategic communications

32. The introduction of the Internet and the associated digital revolution has meant that the role of communications within organisations has shifted from a position of a helpful tool to a "must do". With limited resources and in an increasingly competitive environment, NSOs must focus more and more on outcomes and results. To ensure relevancy, NSOs need to consistently and clearly communicate their values, purpose and differentiators through a strategic approach to communications. This section outlines some of the challenges NSOs face associated with this area, namely developing and prioritising communications, building brand awareness and measuring effectiveness.

1. Developing expertise and prioritising communications

33. The value placed on communications within NSOs is the key. Communications should be viewed as being as important as the development and production of official statistics. There is no point producing statistics unless they are relevant and can be easily understood and accessed by target audiences.

34. The purpose of strategic communication planning is to advance an organization's mission. It draws from expertise from both management and communication domains such as mass communication, public relations, marketing, advertising, participatory communication or user engagement, and dissemination.

35. Strategic communication is a recent field of study. While literature on strategic planning for businesses appeared in the 1960s and expanded in the 1970s, modern communication strategies emerged in the mid-2000s.

36. From a practitioner's standpoint, the focus of strategic communication starts with having professional communicators participate in the formulation of an organization's strategy. The strategic communication program supports the organization in realizing its mission, positions the role of the organization in society, leverages the stakeholders' influence and establishes partnerships to allow the organization to be seen, known and trusted. More importantly, the program ensures that the organization's products and services are reaching the right audiences at the right time using the most appropriate channels.

37. By building a professional communication capability, organizations will ultimately increase cohesion among their teams, better alignment and improved decision making.

38. In general terms, the objectives of a communications strategy should be to ensure that all relevant stakeholders understand the value and importance of official statistics in society. They should also be to create sustainable communications systems, processes and skills that will ensure a consistently high quality of communications between the NSO and its stakeholders. This includes adapting communications outputs to suit particular communications channels.

39. The practice of developing comprehensive communications strategies is a new approach for many NSOs and the challenge for NSOs is to build expertise in this area. This may require upskilling staff across NSOs as appropriate and the development of a network of professional communications experts working within the official statistics domain.

2. Building brand awareness

40. In addition to creating strategic communication strategies, NSOs need to look at increasing their brand recognition.

41. Building brand awareness is not just about promoting a logo; it is about communicating and living the values of an organisation in ways that resonate with the public.

42. The first phase to creating a brand would involve an assessment of the public environment – which would typically include media coverage analysis, analysis of key performance indicators related to access (who access, their satisfaction levels, etc.), and most importantly, public opinion research about the organization: How does the public view the organization? What level of trust is bestowed upon its products? What is the perceived value-added of the NSO? What could be improved? This would typically be followed by a user needs assessment that will inform the creation of target user profiles, the development of innovative approaches to more effectively reach these audiences; and the articulation of differentiated and targeted messaging that resonate with primary and secondary audiences.

43. Branding will also include developing a visual identity (logo and taglines) and messaging guidelines which will create a single, recognisable tone of voice for an organisation's communications outputs. It also involves positioning the brand via a strategic approach to all communications.

44. The report of the UNECE Task Force on the Value of official statistics¹ recognised that building brand awareness is a challenge for official statistics, one where professional expertise could be availed of.

3. Measuring effectiveness

45. Measuring the effectiveness of communications strategies is essential in order to ascertain whether implemented communications activities have enabled an organisation to meet its goals and empower it to face future challenges.

46. Measurement and evaluation against defined goals and objectives are fundamental to any communication programme, whether it be a single campaign or an on-going effort where the results are incremental over time. This practice is a new area for NSOs and numerous forums have identified that NSOs need to learn ways of measuring the effectiveness of what they communicate.

¹ The report is available at <http://www.unece.org/statistics/statstos/task-force-on-the-value-of-official-statistics.html>

C. Broadening the target audience

47. External communication strategies are no longer simply 'mass communication' (from one to many) exercises. The modern communications environment facilitates communication amongst peers (both 'one to one' and 'many to many').

48. In this environment, the specialised field of stakeholder communications is becoming increasingly relevant for NSOs. Understanding that not all audiences are created equal and that different cohorts will have different needs that might require a particular communications response is essential. This has particular relevance for the world of official statistics where traditionally communications and dissemination have focussed on the expert user.

1. The citizen

49. As a result of the data revolution, more and more people have access to data and statistical information. As a result of this change, there is a growing onus on NSOs to communicate with the citizen.

50. Citizen focussed communications pose a new set of communications challenges including:

- what statistical outputs are of interest to the citizen;
- how to communicate in a style that conveys the message adequately, fulfils a useful purpose and yet does not over simplify or dumb down the information?;
- and
- what platforms are best to communicate to an audience that prefers sound bites and simpler, faster communications?

51. Building trust in this audience is vital because the citizen possesses the potential to become the defender of official statistics. Furthermore, by empowering the citizen with this knowledge, NSOs are, in turn, empowering the citizen to hold decision makers to account.

2. Statistical literacy

52. The promotion of skills in statistical literacy and use of statistics is an on-going challenge for NSOs in the post truth era. Success in this area involves understanding the needs of differing customer groups and developing appropriate learning approaches tailored to the specific group, whether they be expert or non-expert, media, young people or the general public. A multifaceted approach is required involving the development of targeted training programmes; social media friendly products and services and competition based initiatives for younger audiences.

53. The importance of 'statistical storytelling' or 'narrative' is an important means of engaging with audiences and developing statistical literacy. People hear statistics, but they feel stories and despite information overload, audiences are still drawn to interesting and relevant stories. An added benefit of this approach is that it also enables richer discussion as data from a number of different sources (e.g. social, economic, environmental etc.) can be discussed together in relation to topics of interest.

54. In terms of communicating official statistics, this means speaking with the people's voice and understanding the user-perspective. Communicating in this way is a challenge for many NSOs who have traditionally disseminated information in a fashion designed only to target expert users.

D. Issue management

55. Effective communication strategies should include a proactive response strategy to issues that have the potential to cause reputational damage. Identifying these issues in advance and preparing responses is essential. This section identifies some of the issues that relate to the world of official statistics and which may require proactive response preparation.

1. Privacy and data protection

56. Big data use is expected to grow exponentially and experimentation using sources such as mobile phone data is taking place in the world of official statistics. The potential of new data sources to provide insight into emerging social and economic trends is immense – but they also present new challenges that are technical, legal and statistical.

57. Consumers are becoming more wary of the vast amounts of data now collected about them – with high-profile data breaches continuing to make the headlines. The challenges for NSOs who are experimenting with the use of Big Data sources or who use online systems for collecting personal data is to effectively reassure the public that confidentiality is a priority and that they will never disclose any data that could subsequently be associated with any person or business.

58. Common messaging could be developed across NSOs to address these concerns. For example, Frequently Asked Questions could be prepared to support the work NSOs are undertaking in this area.

2. Globalisation

59. The effect of globalisation on GDP figures in small open highly globalised economies has led many commentators to question the usefulness of the indicators to measure domestic economies. A striking example of this was the 26% jump in Irish GDP in 2015 due to the relocation of intellectual property assets. Issues arising from the effect of globalisation are likely to continue to emerge and there is a challenge here to clarify the situation for both statistical users and importantly the general public.

60. Failure to communicate the effects of globalisation can lead to experts and non-experts questioning the legitimacy of official statistics and in turn cause reputational damage to an organisation. It may also lead to target audiences turning to alternative sources of data, outside of official statistics.

61. NSOs whose statistical outputs may be affected by globalisation need to ensure that they develop multi-layered communications strategies which target the expert user, the medium users, the media and the wider public.

3. Sustainable Development Goals

62. In early 2017, the United Nations Statistical Commission adopted a measurement framework for the United Nations Agenda 2030 for Sustainable Development, comprising over 230 indicators designed to measure the 17 Sustainable Development Goals (SDGs) and the respective 169 targets. These universal goals cover all three key development pillars: economic, social and environmental. There are a number of potential communications challenges relating to the implementation of SDGs which include the following:

(a) Given the broad range of indicators it will be difficult to distil an overall sense or message regarding a country from such a broad range of indicators. It is likely that

with so many indicators different indicator groups may be moving in different and inconsistent directions leading to confusion and uncertainty.

(b) Different countries may use varying data sources and as such different underlying methodologies in developing their indicators. This could make cross-country comparisons difficult resulting in a communications challenge.

(c) The institutional settings of the National Statistical Systems (NSS) differ and the level of independence afforded the NSS may affect the credibility of the indicators. This again could lead to a communications challenge with regard to cross-country comparisons.

VI. Conclusions and recommendations for discussion by the Bureau

A. Conclusions

63. This document identifies a number of issues and challenges relating to the communication of official statistics. A common thread underlying many of the discussion points raised is the challenging communications environment in which official statistics currently operate.

64. In the last quarter of a century the world has moved from the printed page, where information was delivered in stable fixed formats, to an open fluid digital environment. The negative side of this evolution is that official statistics are no longer seen as the 'single source' of truth. A multitude of other data sources now exist and facts and alternative facts exist in social media forums side by side.

65. In this "post truth" environment the public is increasingly inclined to take a view based on intuition rather than fact. This descent into the world of "truth feelings" is a complex phenomenon that is not easily explained. It is, however, likely linked to a growing loss of trust in institutions as a result of events such as the 2007-2009 financial crisis, combined with changes in the way the public consumes information.

66. The overall challenge for NSOs is how to build 'trust' and stay relevant in this new world era. The solution is not simple but one of the ways NSOs can proactively respond is to develop a strategic approach to communicating their purpose, rationale and outputs.

67. However, the practice of communications is a relatively new field for many NSOs. Most have traditionally focussed on the related field of dissemination which can be described as putting information out into the world in a planned fashion. Communications, on the other hand, goes a step beyond this approach as its purpose is to 'create understanding' amongst target audience groups.

68. Effective communications involves understanding audience needs and shaping tools, channels and outputs to respond to those particular needs. It also involves pre-empting and preparing for potential issues which could cause reputational damage to an organisation.

69. Increasingly, NSOs are recognising the value of effective communications strategies with regard to maintaining the relevance of official statistics. With limited resources and in an increasingly competitive environment, however, communications can no longer be viewed as a 'nice to have' but as a 'must have'. Accepting the "new normal" of the post truth environment and being proactive in communicating and creating understanding is critical to maintaining the long term relevance of official statistics.

70. Finally, it is worth mentioning that prioritising communications within NSOs does not mean that the on-going excellent dissemination practices, which meet the needs of a

narrower yet still very important suite of users (e.g. academics and researchers, etc.), are less important or should be done away with. Rather it should serve to complement and reinforce this important and relevant work.

B. Recommendations

71. In response to the communications related issues and challenges discussed in this review paper, a number of recommendations for future work have been identified designed to support NSOs in prioritising communications. These are as follows:

1. Communications environment

72. In an increasingly competitive post truth environment, NSOs must start to explore their market position.

73. In this regard, it is recommended that a high level working group be established to conduct a 'positioning' exercise. The group would explore fundamental questions such as what do we do now and why, how do we want to be seen and what should our role be? The process would culminate in an agreed position statement that would help to distinguish products and services of NSOs from those of competitors and reach consensus on role boundaries.

2. Strategic communications

74. In order to support NSOs in implementing a strategic approach to communications, the development of a **Communications Framework** is recommended. This would involve structuring a tool kit comprising guidance on:

- The strategic communications development process e.g. positioning, communications environment analysis; identification of communications values and principles; identification of issues and challenges; identification of communications objectives; organisational strategic alignment; and creating the plan;
- Best practice with regard to measuring success;
- Organisational communications maturity model.

75. Building brand awareness forms part of a communications strategy and is intrinsically linked to all communications outputs. In order to support NSOs in building their brand the following recommendations are also proposed:

- development of generic guidance on building brand awareness; and
- brand experts invited to workshops to discuss topics such as social media, content marketing, and market positioning.

3. Broadening the target audience

76. Understanding that the target audience base for NSOs is no longer primarily confined to the expert user but must be expanded to recognise the increasingly important role of the citizen and the citizen as a key user group is crucial. The challenge for NSOs is to build awareness of official statistics amongst the wider, non-expert audience.

77. Many NSOs are experimenting with ways of communicating to the citizen. Knowledge sharing and learning across organisations in forums such as the UNECE Workshop on Statistical Data Dissemination and Communication should be prioritised. For example, discussions around topics such as building statistical literacy via storytelling and

narrative, experimental social media campaigns, and new citizen focussed statistical outputs should form part of the workshop agenda.

4. Issue management

78. A proactive approach to issue management is an integral part of a communications strategy. In order to support NSOs in this area the following is recommended:

- Development of a generic guidance document with regard to issue management to include issue identification, internal and external communications protocols (e.g. who gets told what, when and how), drafting of holding statements, Q&A development, spokesperson training and preparation and the use of external expertise as appropriate.
- Issue / crisis management scenario planning workshops for NSOs inviting external expertise. This work would involve both communications and subject matter staff.
- Encourage task teams and meetings to share experiences on how they communicate about their subject matter.
- Agenda items at the UNECE Workshop on Statistical Data Dissemination and Communications to discuss current and potential issues and knowledge / experience sharing with regard to the issues listed above.

VII. In-depth review discussion and decisions by the Bureau

79. The in-depth review paper (ECE/CES/BUR/2017/OCT/2), prepared by the Central Statistical Office of Ireland summarised international activities related to the emerging issues in statistical communication, and identified issues and challenges in the area.

80. The discussion at the CES Bureau meeting in October 2017 included the following points:

- (a) There is strong support for considering statistical communication from a strategic viewpoint. The changing environment where official statistics operate pushes to redefine their relevance and role;
- (b) Statistical organizations should look at communication strategies in a broader context of risk management and business continuity;
- (c) Further work should focus on a common understanding at the strategic level of communication rather than trying to harmonize the actions and tactics;
- (d) A broad range of topics could be examined. A strategic approach to communications, issue and crisis management, communication principles, measuring the success and impact of communication are of particular interest;
- (e) The necessity to act in real-time environment (e.g., through tweets and social media) poses an additional challenge of how to make the subject matter and communications experts work together and who can be the spokesperson for official statistics;
- (f) The work should use available material about communications from outside official statistics;
- (g) It will be useful to establish priorities among the list of challenges in statistical communication identified through the review, and focus the work. It is important to share experiences and develop guidance based on good practices. The actions should be

considered in connection with work in other related areas, such as strategic partnerships, value of official statistics, capability development, etc.;

(h) It will be useful to get input from more countries about their challenges and issues in communication.

VIII. Follow up activities

81. Each year a Workshop on the Modernisation of Official Statistics is held in November that reviews the work undertaken under the auspices of the High Level Group for the Modernisation of Official Statistics (HLG-MOS) during that year. The workshop also considers proposals for work to be undertaken in the following year. In December 2017, HLG MOS approved a project for 2018 on Strategic Communication.

82. The project will focus on enabling NSOs to modernise their communications at the strategic level. It will include the following work packages:

- Work Package 1: Guidelines on the strategic communications development process;
- Work Package 2: Best practices on defining a position in the new communications environment;
- Work Package 3: Guidelines on issue and reputation management.

83. The project to develop a Strategic Communication Framework was launched in February 2018 with a sprint session attended by experts from Australia, Canada, Ireland, Italy, Mexico, Netherlands, Poland, and the United Kingdom. The Sprint team identified the main outputs of the project and developed an outline document of the strategic framework.

84. Strategic communications and issue management will be discussed further in the CES Seminar on "Getting our message across: Strategic reflections on modernizing statistical communication" and at the 2018 Workshop on Statistical Data Dissemination and Communication, which will be held in Cork, Ireland on 25-27 June. The outcomes of both events will directly feed into the HLG-MOS Strategic Communication Framework project.

Annex

I. Country approaches to communications

1. The following section outlines the approach to communications undertaken in some UNECE member countries.

A. Austria

2. For Statistics Austria, a modern provider of high-quality information for society, science, business, politics and administration, it is essential not only to produce data about relevant facts of life, but also to communicate them effectively and proactively.

3. "Transformation of data into information" is one of five main pillars of Statistics Austria's current "Strategy 2020". Together with other objectives, as e.g. "modern, integrated data production" and "relevance to society", this topic has high priority. The "Strategy 2020" continues Statistics Austria's work on earlier communicative strategy projects (such as branding, marketing activities or media training), but raises the topic to a new level: conventional communication of results is no longer sufficient, it is necessary to distil information from the data and offer it to users in a comprehensible form.

Some of the relevant projects of "Strategy 2020" deal with

- enhancement of data visualization and information graphics;
- expansion of social media activities;
- evaluation and improvement of Statistics Austria's website;
- topic-oriented publications;
- app development; and
- improvement of the statistical database STATCube.

Media cooperation with impact on social media

4. In line with "Strategy 2020", Statistics Austria began cooperating with the renowned weekly newspaper "Falter" in September 2016. Since then, each issue of the magazine contains a page titled "Numbers! The weekly conversation about new data and hard facts", presenting statistical insights on a relevant topic. The page consists of a custom-made infographic and an interview with Statistics Austria's Director General, who explains details of the subject in a comprehensible way. Collaboration with "Falter" goes far beyond traditional media cooperation; it definitely pays off regarding its reception – especially on Twitter. The tweets with the weekly Falter infographics are always among Statistics Austria's most retweeted and liked "top tweets".

B. Canada

5. The Communication Program ensures that Statistics Canada is seen, known and trusted by Canadians, and that the information published is broadly used.

6. This work is conducted by communication experts, with sections organized by functions:

- Official release;
- Media relations;
- Strategic communications and issue management;
- Outreach and events;

- Social media and online engagement;
- Client consultations;
- Writing, translation and editorial services;
- Internal communications;
- Respondent communications.

7. The Communication Program leads the Agency-wide governance, policy and accountability frameworks for these functions, ensuring they comply with governing legislation and central agency direction. The DG responsible for the program is accountable for the effective and timely provision of official statistics and related information to news media, the general public, governments, the academic community, businesses, private organizations, institutions and international organizations all the while maintaining a constructive relationship with them.

8. Having communications planned, executed and evaluated in a single area maximizes the coherence, quality and effectiveness of all agency communications. Every product, activity, tool is reused and repurposed across channels and functions for maximum reach—coordination is key.

9. A set of communication policies and guidelines ensures that innovative work and new initiatives remain aligned with its core commitments:

- All Canadians have equal access to new data at the same time;
- High-quality and accurate information is shared on all channels;
- Ongoing collaboration with stakeholders, data users and decision makers is key to remaining connected, visible and relevant;
- Leading-edge methods are leveraged for maximum efficiency and impact.

10. All communications activities – from planning through to media relations and issue management, all the way to engagement and channel development – support the above commitments.

C. Finland

11. Communication is an important element of Statistics Finland's operations, management, stakeholder cooperation and influence. Communication supports the strategic choices of the organisation, helps foresee future needs and agilely react to new challenges.

12. The communication principles at Statistics Finland are based on the values and strategy of Statistics Finland, and the ethics and principles of the official statistics of Finland. The basic communication principles are:

- Reliability;
- independence and impartiality;
- openness and interaction;
- proactivity and timeliness, and
- understandability.

13. Communication affects the public image and reputation of official statistics and Statistics Finland. In Finland, 86 per cent of the population knows Statistics Finland and 85 per cent believe statistics are reliable. Statistics are widely trusted in society and Statistics Finland wants to maintain this trust. Communication makes Statistics Finland stand out as a producer of quality and factual data, improves the retrievability and accessibility of

statistical data, and increases interaction with customers. Communication makes statistics accessible and Statistics Finland visible in society. Successful communication promotes statistical literacy.

14. Communication directed at data suppliers is also part of the communication activities. The aim of data supplier communication is to motivate the data supplier in order to receive high-quality data and increase response rates.

15. Communication involves the entire organisation and is part of everyone's work. The use of new communication channels (social media, videos) and active participation in social discussion with statistical data (blogs, online articles, and social media posts) strengthen fact-based decision-making in society.

D. Germany

16. In Germany, Destatis has developed a comprehensive communication strategy based on 5 pillars:

- strengthen the brand of "official statistics",
- improve access,
- meet the needs of target groups,
- expand the dialogue, and
- improve understandability.

17. In relation to brand awareness, key aspects of Destatis's communications strategy include:

"Open Copyright"

18. Destatis has started to clearly display its copyright brand "Statistisches Bundesamt (Destatis)" in graphs and readymade tables that can be used by newspapers, magazines and other sources. These ready-to-use interactive graphs can be used in different internet platforms making the official statistics brand more widely known.

Content marketing

19. Destatis has also started to create brand awareness through content marketing, a new trend currently used by leading German enterprises such as Daimler and Telekom. At Destatis, content marketing is carried out using software research: which topics are being discussed in different websites; which ones have a high relevance; which statistics are not well represented; and how to bring statistics into websites where this is little or no use of Destatis official statistics. In relation to the latter, this can be achieved by making new statistical contents available for websites or by simply making the website owners aware of existing statistical products and highlighting the advantages of having this statistical information. When websites agree to incorporate statistical data from Destatis success is achieved.

20. The use of content marketing is a significant institutional cultural change for Destatis. No longer is it sufficient to merely produce statistical products for user needs. The goal now is to place these products in as many relevant platforms as possible in order to increase their impact.

E. Ireland

21. In 2017, the Central Statistics Office (CSO) established a press office for the first time and developed a strategic approach to communications to cover the period 2017 - 2019.

22. Specifically, the objectives of this strategy are to:

- ensure that all external CSO communications are of a high standard and are responsive, cohesive, co-ordinated and aligned to the CSO's strategic objectives;
- strengthen and improve stakeholder's knowledge and understanding of the value and relevance of official statistics with an increasing focus on the citizen; and
- promote the CSO as relevant, responsive, ambitious, and innovative.

23. The strategy includes a number of lead projects such as rebranding the CSO, the establishment of a press office, a citizen focussed campaign, visualisation strategy, social media strategy, media strategy, customer focus strategy and website refocus / redesign.

24. In relation to the post truth challenge, Ireland has adopted a response to the problem based on the following three tenets of being competitive, authoritative and collaborative as follows:

Competitive	• Competitive advantage / Brand, e.g. promote the values and rebrand • Be relevant, e.g. new reports which address key decision making information gaps • Citizen focus, e.g. develop new products and campaigns for the general public. Develop new ways of visualisation • New platforms, e.g. explore and expand social media / digital presence • Explore partnerships, e.g. visualisation projects with other public sector bodies
Authoritative	• Respond, correct, clarify, e.g. revert to media when information is used incorrectly. • Educate, educate, educate, e.g. education media and users as well as younger audiences
Collaborative	• Share & learn, e.g. work with our international counterparts • Create allies with media and opinion formers, e.g. relationship building media to gain feedback and establish contacts

F. United Kingdom

25. In Office for National Statistics (ONS) the communications approach is driven by the goal of supporting the 'Better Statistics, Better Decisions' strategy set out by the UK Statistics Authority. In particular there is a significant emphasis on making sure that ONS supports users to make decisions based on high-quality statistics.

26. There is a dedicated digital publishing function within ONS that develops the website, creates visual and other digital products, and also manages social media. The ONS

has categorised its online users into a number of “personas”, and different digital channels are used to target them. These are the “expert user”, the “information forager” and the “enquiring citizen”.

27. ONS works closely with the media to ensure its statistics are communicated widely. For market-sensitive economic statistics, wire journalists (i.e. Bloomberg, Reuters) are invited to attend lock-in sessions prior to the release of statistics so they are able to ask questions and ensure the accuracy of their stories, but without risking the early release of said statistics.

28. There is also a dedicated “User Insight and Engagement” function that focuses on developing how the organisation engages with its users and gathering intelligence on the external environment so the organisation can make better informed choices about how it communicates and engages with the outside world.

29. Internally, ONS is establishing a central intelligence function (part of the User Insight and Engagement team) that is looking to pull together information from a range of sources to provide both ad hoc and regular information to the rest of the organisation so that ONS better understands the external context in which it operates in and how it can engage with it. Examples of the information being collected, analysed and disseminated internally include feedback from stakeholder engagement, consultations and policy initiatives taking place elsewhere in Government, public surveys of what topics people are most concerned about, and topics that are being highlighted in the media.



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Outcomes of in-depth reviews carried out by the Conference of European Statisticians Bureau in October 2017 and February 2018

Outcome of the in-depth review of gaps in gender statistics

Note by Mexico and the Secretariat

Summary

This document contains the paper for the CES Bureau's in-depth review of gaps in gender statistics prepared by Mexico in 2017 and subsequently modified to reflect the comments provided by the UNECE Secretariat, by the CES Bureau during the discussions at its meeting in Yerevan, Armenia, on 10–11 October 2017, and by participants in the UNECE Work Session on Gender Statistics in Belgrade, Serbia on 1 December 2017.

The final section of the document summarizes the discussions and presents the decisions on follow-up work taken by the CES Bureau at its meeting in Helsinki, Finland, on 14–15 February 2018.

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Contents

<i>Chapter</i>	<i>Paragraphs</i>	<i>Page</i>
I. Summary of the in-depth review paper	1–6	3
II. In-depth review paper.....	7–97	3
A. Introduction	7–11	3
B. Scope of the statistical area covered	12–14	4
C. Overview of international statistical activities in the area	15–92	5
1. United Nations Economic Commission for Europe (UNECE)	15–20	5
2. United Nations Statistics Division.....	21–31	6
3. UN Women	32–38	8
4. International Labour Organization (ILO)	39–44	9
5. Eurostat	45–48	10
6. Organisation for Economic Co-operation and Development (OECD)...	49–55	11
7. Food and Agriculture Organization of the United Nations (FAO)	56–59	11
8. United Nations Population Fund (UNFPA).....	60–63	12
9. European Institute for Gender Equality (EIGE)	64–69	12
10. World Bank	70–77	13
11. International Monetary Fund (IMF)	78–79	14
12. United Nations Children's Fund (UNICEF)	80–85	14
13. World Health Organization (WHO)	86–88	15
14. United Nations Development Programme (UNDP)	89–90	16
15. UNESCO Institute for Statistics (UIS).....	91–92	16
D. Issues and challenges.....	93–95	16
E. Conclusions	96	17
F. Recommendations.....	97	17
III. Discussion and decisions by the CES Bureau	98–100	18
A. In-depth review discussion	98–99	18
B. Outcomes and follow-up work	100	19
Annex		20
Tier Classification for Global SDG Indicators for Goal 5 (as of December 2017) .		20

I. Summary of the in-depth review paper

1. In the past ten years, attention to gender statistics has been renewed. The momentum generated by the Beijing Platform for Action, the Millennium Development Goals, the Minimum Set of Gender Indicators, as well as the statistical activities and projects promoted by international organizations and United Nations regional commissions and conferences, and by individual countries, have translated into progress in the development of gender statistics at all different levels in the world.
2. Now, the goals and indicators of the 2030 Agenda for Sustainable Development bring a new impetus for statistics and progress towards gender equality. In order to deal with inequalities and so that no one is left behind, there is an increased demand for detailed and abundant information. In addition to the requirements of goal number 5, "Achieve gender equality and empower all women and girls", it is necessary to mainstream gender into the other objectives and indicators.
3. There is, as a result of this new impetus, already a better institutional, methodological and data access infrastructure to facilitate progress in gender statistics. The unresolved conceptual and methodological aspects of Tier II and III indicators have been distributed among the international agencies according to their competences, so that they can be resolved more quickly, and in almost all cases these agencies have already incorporated these themes into their activities. Likewise, the role of the National Statistical Offices as coordinators of statistical work has been defined and the existence of focal points and mechanisms for dialogue with users has been identified.
4. There are particular challenges relating to the set of indicators for goal 5. In the case of time-use surveys and surveys on violence against women, even when methodological standards already exist, it is necessary to update them and establish parameters that promote standardization of statistics and indicators. The advances and interests of the countries of the United Nations Economic Commission for Europe (UNECE) region make it pertinent to give attention to economic statistics with a gender approach, to entrepreneurship and to decision-making in households.
5. The development of capacity-building is needed to produce and promote knowledge. Also, the use of gender statistics is an area requiring strategic attention.
6. It is stressed that UNECE has defined its Road Map for Sustainable Development Statistics, and therefore gender statistics and indicators should be harmonized with this framework.

II. In-depth review paper

A. Introduction

7. In light of the 2030 Agenda for Sustainable Development, gender equality and women's empowerment are taking an increasingly important place among global policy concerns. The need to monitor the fifth SDG on gender equality and the empowerment of women and girls, as well as the broad and deep inclusion of gender concerns throughout the 2030 Agenda, are creating a growing demand for high-quality gender statistics.
8. Against this background, during its February 2017 meeting the CES Bureau selected gender statistics as a topic for an in-depth review. The last time that the topic was reviewed in depth was in 2007, so it was considered timely to return to the topic ten years on to assess progress, identify persistent gaps and shortcomings, and determine needs for methodological, conceptual and capacity development work.

9. The Bureau of the Conference of European Statisticians (CES) regularly reviews selected statistical areas in depth. The aim of the reviews is to improve coordination of statistical activities in the UNECE region, identify gaps or duplication of work, and address emerging issues. The review focuses on strategic issues and highlights concerns of statistical offices of both a conceptual and a coordinating nature. The current paper provides the basis for the review by summarizing the international statistical activities in the selected area, identifying issues and problems, and making recommendations on possible follow-up actions.

10. The CES Bureau selected gender statistics for an in-depth review at its meeting in Geneva, Switzerland, 14-15 February 2017. Mexico, through the National Institute of Statistics and Geography, volunteered to prepare the paper. The current paper provides the basis for the review by summarizing the international statistical activities in the area of gender statistics, identifying issues and problems, and making recommendations for possible follow-up actions.

11. Mexico prepared the paper for the in-depth review. As background, it used the paper "Gender statistics: progress being made by international organizations" prepared by Italy and presented at the CES Bureau meeting in Helsinki, Finland, 18-19 October 2007¹. The UNECE Secretariat provided a supporting paper with additional commentary. A discussion took place at the meeting of the CES Bureau in October 2017, and the outcomes were presented and further discussed at the UNECE Work Session on Gender Statistics in Belgrade, Serbia, in December 2017.

B. Scope of the statistical area covered

12. The 2030 Agenda for Sustainable Development was agreed to in September 2015 by Heads of State and high-level representatives, and sets out a set of goals for combating inequalities and leaving no one behind. This 2030 Agenda includes 17 Sustainable Development Goals (SDGs), 169 associated targets and 232 unique indicators. The 14 indicators of goal 5 "Achieve gender equality and empower all women and girls" are the scope of this review.

13. Follow-up of the implementation of the 2030 Agenda for Sustainable Development requires a solid framework of indicators and statistical data to monitor progress, inform policy and ensure accountability of all stakeholders. Hence, SDG indicators should be broken down, where appropriate, by income, sex, age, race, ethnicity, migratory status, disability and geographical location, or other characteristics, in accordance with the Fundamental Principles of Official Statistics.

14. The 2030 Agenda is a major challenge for National Statistical Offices and for national statistical systems more broadly, not only because of the demands created by the large number of indicators, but also because the proposed indicators present challenges of varying difficulty, both in the methodological aspects and in the availability of the data to calculate them. For this reason they are grouped into three tiers, as can be seen in the annex with specific reference to the indicators of goal 5. The methodological development and/or the design of the collection instruments is assigned to "custodian agencies", international agencies with responsibility for specific indicators.

¹ Available at https://www.uncece.org/fileadmin/DAM/stats/documents/ece/ces/bur/2007/mtg1/3_e.pdf

C. Overview of international statistical activities in the area

1. United Nations Economic Commission for Europe (UNECE)

15. UNECE enjoys a reputation of a leader in the field of gender statistics in the region. As the Regional Commission representing many of the countries that are recognized globally as being the most advanced in matters of gender equality, UNECE has been able to focus on new and emerging themes in gender statistics. Working closely with donors and partner agencies, UNECE's gender statistics programme, which has been bringing together experts in the field for Work Sessions since 1985², has brought about significant progress in the statistical measurement of gender issues and the production and communication of gender statistics for evidence-based policymaking.

16. UNECE's role in gender statistics centres around coordination and outreach with the gender focal points in national statistical offices (NSOs), under the guidance of the Steering Group on Gender Statistics which was established by the CES Bureau in 2005³. Through direct and regular interaction with these focal points, such as during the Work Sessions on Gender Statistics, which take place approximately every 18 months, and in subregional workshops, UNECE is able to identify and respond to the needs and priorities of the Member States.

17. UNECE's work on gender statistics includes methodological work, capacity development, the UNECE gender statistics database⁴ and the organization of Work Sessions for exchange of experience. These strands of work have led to the development of methodological and training materials, including:

- (a) *Developing Gender Statistics: A Practical Tool*⁵;
- (b) *Using Gender statistics: A Toolkit for Training Data Users*⁶; and
- (c) *Indicators of Gender Equality*⁷.

to name a few. The latter document, published in 2015, builds upon the Global Minimum Set of Gender Indicators to define a regional core set of gender indicators to describe and monitor gender inequalities.

18. UNECE published the *Guide on Valuing Unpaid Household Service Work*⁸ in December 2017 and currently coordinates the Task Force on Measuring Intra-household Power and Decision-making, established in 2017 with the objective of making an inventory of indicators and sources and providing recommendations to statistical offices on measuring the gendered dimensions of intra-household power and decision-making.

19. UNECE has led capacity development work in the framework of several United Nations Development Account (UNDA) projects, and is currently leading the gender statistics component of the UNDA project on "Statistics and Data". The capacity

² The first Joint ECE/INSTRAW Meeting on Statistics and Indicators on the Role and Situation of Women took place in Geneva on 11–14 March 1985. UNECE has organized Work Sessions from 2000 onwards, every two years until 2016 and every 1.5 years thereafter.

³ The Steering Group is currently chaired by Serbia and includes representatives from Australia, Canada, Georgia, Italy, Republic of Moldova, Sweden, Switzerland, United Kingdom, United States of America, CIS-Stat, Eurostat, the European Institute for Gender Equality, OECD Development Centre and UN Women.

⁴ Available at www.unece.org/data

⁵ Available at https://www.unece.org/fileadmin/DAM/stats/publications/Developing_Gender_Statistics.pdf

⁶ Available at <https://www.unece.org/stats/gender/toolkit.html>

⁷ Available at http://www.unece.org/fileadmin/DAM/stats/publications/2015/ECE_CES_37_WEB.pdf

⁸ Available at <https://www.unece.org/index.php?id=47511>

development and technical assistance activities undertaken by UNECE help to ensure the production, dissemination and communication, and use of gender-relevant SDG indicators and other gender statistics. UNECE has provided support to countries for the development and use of surveys on violence against women, women's entrepreneurship and time use, among other topics.

20. As a member of the Inter-Agency and Expert Group on Gender Statistics (IAEG-GS), which coordinates the Global Gender Statistics Programme, as well as a member of the Steering Group for UN Women's Flagship Programme Initiative "Making Every Woman and Girl Count", UNECE is well-placed both to understand and to influence the strategies and priorities in gender statistics at the global level.

2. United Nations Statistics Division⁹

21. UNSD implements the Global Gender Statistics Programme, as mandated by the United Nations Statistical Commission. The main aims of UNSD's work in the area of gender statistics are:

- (a) To review standards and methods currently used in the compilation of official statistics;
- (b) To identify ways to integrate a gender perspective in data collection, presentation and dissemination;
- (c) To compile and to disseminate gender statistics, making gender statistics and indicators easily available in formats and media that are not only easily accessible to users, but are also understood;
- (d) To provide a variety of technical assistance on gender statistics to NSOs, regional programmes and United Nations agencies. This support covers such activities as organizing training workshops and other meetings at interregional as well as regional and national levels, and providing direct technical assistance to countries, agencies and other institutions.

22. In addition, UNSD launched the Sustainable Development Goal indicators website, a platform for disseminating the database of SDG indicators. This platform provides access to data and metadata from throughout the United Nations system in preparation for the Secretary-General's annual report on "Progress towards the Sustainable Development Goals". It includes information on the work of the High-level Group for Partnership, Coordination and Capacity-Building for Statistics for the 2030 Agenda for Sustainable Development, and the Inter-agency and Expert Group on SDG Indicators. It includes global data and metadata, the official indicator list and the global-level tier classification of indicators.

(a) *Evidence and Data for Gender Equality Project (EDGE)*¹⁰

23. The Evidence and Data for Gender Equality (EDGE) project is a joint initiative of the United Nations Statistics Division and UN Women that seeks to improve the integration of gender issues into the regular production of official statistics to support evidence-based policymaking.

⁹ <https://unstats.un.org/unsd/demographic/gender/default.htm>

¹⁰ <https://unstats.un.org/unsd/demographic-social/gender/index.cshml#IAEG-GS>

24. EDGE aims to accelerate existing efforts to generate internationally comparable gender indicators on health, education, employment, entrepreneurship and asset ownership in three key ways:

(a) Developing an online interactive platform to disseminate gender-relevant data and metadata on education, employment, and health in line with the Minimum Set of Gender Indicators;

(b) Developing methodological guidelines on measuring asset ownership and entrepreneurship from a gender perspective, endorsed by the UN Statistical Commission in 2017;

(c) Providing technical support to countries to implement the EDGE methodological guidelines.

25. The EDGE project is guided by a Steering Committee composed of members of the Inter-Agency and Expert Group on Gender Statistics (IAEG-GS).

(b) *The Inter-agency and Expert Group on Gender Statistics (IAEG-GS)*¹¹

26. UNSD serves as Secretariat to the Inter-Agency and Expert Group on Gender Statistics (IAEG-GS), the coordinating and guiding body of the Global Gender Statistics Programme. The group comprises representatives of UN entities and other international agencies, statisticians from NSOs, and other partners, to guide and monitor activities aimed at the advancement of gender statistics. It meets annually and works through advisory groups.

27. Another function is to guide the development of manuals and methodological guidelines for gender statistics production and use. Products whose development have been overseen by the IAEG-GS include *Guidelines for Producing Statistics on Violence against Women*¹², published in 2014, and the *International Classification of Activities for Time Use Statistics*¹³, published in 2016.

28. The IAEG-GS coordinates the Minimum Set of Gender Indicators¹⁴ that serves as a guide for national production and international compilation of gender statistics. The Minimum Set of Gender Indicators is a collection of 52 quantitative indicators and 11 qualitative indicators addressing relevant issues regarding gender equality and/or women's empowerment in five domains:

- (a) Economic structures;
- (b) Participation in productive activities and access to resources;
- (c) Education, health and related services;
- (d) Human rights of women and girls; and
- (e) Public life and decision-making.

29. The indicators are classified into three tiers, with the same criteria as those used for the SDG indicators.

30. The indicators of the Minimum Set were selected to monitor gender equality and women's empowerment. They were initially developed with reference to the strategic objectives of the Beijing Platform for Action and the Millennium Development Goals and

¹¹ <https://unstats.un.org/unsd/demographic-social/gender/index.cshhtml#IAEG-GS>

¹² https://unstats.un.org/unsd/gender/docs/guidelines_statistics_vaw.pdf

¹³ <https://unstats.un.org/unsd/demographic-social/time-use/icatus-2016/>

¹⁴ <https://genderstats.un.org/#/home>

targets; they are now being reviewed by an advisory group to assess their coherence with the SDG gender indicators and determine any need for changes. At the same time, their tier categorization is being reviewed. For example, the indicators related to time use may soon be moved from tier II to tier I.

31. The IAEG-GS maintains a specific website for the Global Gender Statistics Programme¹⁵ that provides a platform for the dissemination of developments in the gender statistics fields and promotes inter-institutional collaboration

3. **UN Women¹⁶**

32. UN Women was established in July 2010 to lead and to coordinate United Nations activities on gender equality issues. It merges and builds on the important work of four previously distinct bodies of the UN system, which focused exclusively on gender equality and women's empowerment: the Division for the Advancement of Women (DAW); the International Research and Training Institute for the Advancement of Women (INSTRAW); the Office of the Special Adviser on Gender Issues and Advancement of Women (OSAGI); and the United Nations Development Fund for Women (UNIFEM).

33. UN Women works for the elimination of discrimination against women and girls, empowerment of women, and achievement of equality between women and men as partners and beneficiaries of development, human rights, humanitarian action and peace and security.

(a) *SDG indicator development*

34. UN Women is designated as the responsible agency for monitoring several of the SDG 5 indicators, either solely (indicators 5.c.1 & 5.5.1b) or in collaboration with other agencies (indicators 5.1.1, 5.2.1, 5.2.2, 5.4.1, 5.6.1, 5.6.2, 5.a.1 & 5.a.2).

35. As one of the designated custodian agencies to monitor three tier III SDG indicators, UN Women works with its partners to develop methodological standards for those indicators, which are the following:

(a) Indicator 5.1.1: Whether the existence or not of legal frameworks to promote, to enforce and to monitor equality and non-discrimination on the basis of sex (with OECD Development Centre and World Bank);

(b) Indicator 5.5.1: Proportion of seats held by women in (a) national parliaments and (b) local governments;

(c) Indicator 5.c.1: Proportion of countries with systems to track and to make public allocations for gender equality and women's empowerment (gender budgeting).

36. To develop methodological standards for each of these indicators, UN Women is taking the following steps: (i) commissioning a discussion paper on the concepts being measured; (ii) organizing a global workshop with national and international subject matter experts; (iii) developing guidelines and survey instruments; (iv) piloting data collection instruments; (v) conducting global and regional consultations to seek feedback from countries and ultimately validate the approach and results; and (vi) presenting the results to the IAEG-SDGs for approval and reclassification into tier II.

37. By July 2017, steps (i) to (iv) had already been completed for all three indicators. Between August and October 2017, the consultations (i.e. step v) took place, and in

¹⁵ <https://unstats.un.org/unsd/demographic-social/gender/index.cshml#home>

¹⁶ <http://eca.unwomen.org/en/digital-library/publications/2017/02/assessment-of-opportunities-for-un-women-to-support-the-development-of-gender-statistics-in-eca>

November 2017 the results for all three indicators were presented to the IAEG-SDGs (step vi). The IAEG-SDGs decided to reclassify indicators 5.5.1b (proportion of seats occupied by women in local governments) and 5.c.1 to tier II. UN Women is thus working with its partners to provide technical support to countries, including technical notes and training packages to support the production of these indicators.

(b) *Flagship Programme Initiative*

38. In order to respond to the challenges of effectively monitoring the SDGs from a gender perspective, as well as taking advantage of the current momentum and support for the SDGs and gender statistics, UN Women developed the Flagship Programme Initiative, "Making Every Woman and Girl Count"¹⁷, which aims to bring about a radical change in production, availability, accessibility and use of quality data and statistics on key aspects of gender equality and women's empowerment. The project began in 2016 and will continue until 2020.

4. **International Labour Organization (ILO)**

39. With the promotion of decent work opportunities for women and men at the centre of its mission, ILO is guided by its 1999 Policy on Gender Equality and Mainstreaming. An Action Plan for Gender Equality 2016–17¹⁸ seeks to translate the overarching policy into practice.

40. ILO coordinates a portfolio of development cooperation projects that aim to promote gender equality and women's empowerment across the strategic objectives of its Decent Work agenda.

41. The importance of a gender perspective in statistics on work and working conditions was recognized and formalized in a 2003 "Checklist of good practices for mainstreaming gender in labour statistics"¹⁹ adopted by the 17th International Conference of Labour Statisticians. The checklist, even 15 years on, remains a succinct and relevant normative instrument to guide the collection and dissemination of gender-relevant statistics.

42. ILO will celebrate its 100th anniversary in 2019. Its *Women at Work* Centenary Initiative renews the organization's commitment to promote gender equality and to identify measures that will give new impetus to work in this domain.²⁰ The initiative focuses on discrimination, pay, care work and violence and harassment. Within this initiative there are numerous activities relevant to gender statistics. These include, for example, the *Women at Work: Trends* 2016 publication, in which sex-disaggregated statistics on labour force participation, employment and unemployment, paid and unpaid work, sectoral segregation and gender differences in wages, social protection and status in employment are presented and analyzed.²¹

43. Led by ILO, UN Women and OECD, the Equal Pay International Coalition (EPIC) is a multi-stakeholder coalition to contribute to the achievement of SDG target 8.5 focusing on equal pay between women and men for work of equal value. Its objective is to multiply the outreach and impact of partnerships, providing a framework within which existing

¹⁷ <http://www.unwomen.org/en/how-we-work/flagship-programmes/making-every-woman-and-girl-count>

¹⁸ Available from http://www.ilo.org/gender/Informationresources/WCMS_351305/lang--en/index.htm

¹⁹ Available from http://www.ilo.org/global/statistics-and-databases/standards-and-guidelines/guidelines-adopted-by-international-conferences-of-labour-statisticians/WCMS_087632/lang--en/index.htm

²⁰ http://www.ilo.org/global/about-the-ilo/history/centenary/WCMS_480301/lang--en/index.htm

²¹ Available from: http://www.ilo.org/gender/Informationresources/Publications/WCMS_457317/lang--en/index.htm

initiatives and organizations can connect and reinforce each other.²² Among the target indicators of success for the coalition is a reduction in gender pay gaps, for which sex-disaggregated data are essential.

44. It is important to highlight the relevance of the *Resolution concerning statistics of work, employment and labour underutilization* issued at the 19th International Conference of Labour Statisticians in 2013²³, which extended the concept of work to include domestic and unpaid care work and to address the concept of total work. This Resolution is already providing a strong basis for the promotion of statistics that make unpaid household work visible.

5. Eurostat²⁴

45. In an infographic produced by Eurostat in 2017, *Women in the EU*²⁵, some of the headline gender statistics compiled by Eurostat from Member States can be seen. The gender equality dataset published by Eurostat is one of two main strands of equality data (the other strand being those relating to ageing). The datasets: a) show how women and men are located in areas such as education, the labour market, earnings and social inclusion, childcare, health and information society; b) present a selection of Eurostat's sex-disaggregated data and link to further statistics, and c) were chosen based on European Union policy documents such as the strategy for equality between women and men (2010–2015), the women's charter (2010) and the roadmap for equality between women and men (2006–2010).

46. Eurostat's 2017 e-publication, *The life of women and men in Europe: a statistical portrait*²⁶, developed by Eurostat in collaboration with NSOs, uses interactive tools and visualizations to highlight the similarities and differences in the lived experiences of women and men across the region. It serves as an example of effective communication techniques to bring relevant and understandable gender statistics to everyday users among the general public.

47. The publication *Sustainable Development in the European Union: Monitoring report on progress towards the SDGs in an EU context*²⁷ is the first edition of regular monitoring exercises towards the sustainable development goals. Within this publication, monitoring of SDG 5 focuses on the sub-themes of gender violence, education, employment and leadership positions.

48. The ongoing work of the Eurostat Task Forces on Innovative Tools and Sources for Household Budget Surveys and for Time-Use Surveys are responding to calls for better coverage and comparability, identifying ways to foster more efficient data collection and to make use of evolving technologies so that the burden on both respondents and statistical offices may be reduced. The outcomes of these Task Forces should lead to improvements in data availability for gender statistics.

²² <http://www.ilo.org/global/topics/equality-and-discrimination/epic/lang-es/index.htm>

²³ http://www.ilo.org/global/statistics-and-databases/standards-and-guidelines/resolutions-adopted-by-international-conferences-of-labour-statisticians/WCMS_230304/lang-en/index.htm

²⁴ http://ec.europa.eu/eurostat/statistics-explained/index.php/Gender_statistics

²⁵ Available from: http://ec.europa.eu/eurostat/statistics-explained/images/e4/Women_in_the_EU_2017.jpg

²⁶ Available from: <http://ec.europa.eu/eurostat/cache/infographs/womenmen/>

²⁷ Available from: <http://ec.europa.eu/eurostat/web/products-statistical-books/-/KS-04-17-780>

6. Organisation for Economic Co-operation and Development (OECD)

49. OECD's Gender Initiative²⁸ examines barriers to gender equality in education, employment, and entrepreneurship. It monitors the progress made by governments to promote gender equality and provides good practices based on analytical tools and data.

50. The 2015 OECD Recommendation of the Council on Gender Equality in Public Life²⁹ calls for systematic strengthening of the evidence base on gender equality through improved data collection, dissemination and coordination.

51. The OECD Gender Data Portal³⁰ includes selected indicators on gender inequalities in education, employment, entrepreneurship, governance, health and development. The data cover OECD member countries and partner economies including Brazil, China, India, Indonesia, and South Africa.

52. In its 2017 report *The pursuit of gender equality: An uphill battle*³¹, OECD presents statistical indicators that illustrate gender gaps regarding education, employment, entrepreneurship, migration, public life, unpaid work and violence against women, and highlights the recent initiatives of "best practice" policies, such as salary transparency measures to reduce gender wage gaps and incentives for fathers to take parental leave.

53. OECD works with UN Women and the World Bank to monitor SDG indicator 5.1.1 (elimination of all forms of discrimination) and conducts research to harmonize data on violence against women for member countries.

54. The OECD Development Centre produces the Social Institutions and Gender Index (SIGI). The SIGI covers five dimensions of discriminatory social institutions, spanning major socio-economic areas that affect women's lives:

- (a) Discriminatory family code;
- (b) Restricted physical integrity;
- (c) Son bias;
- (d) Restricted resources and assets; and
- (e) Restricted civil liberties.

55. Through its 160 country profiles, country classifications and unique database, the SIGI provides a strong evidence base to more effectively address the discriminatory social institutions that hold back progress on gender equality and women's empowerment.

7. Food and Agriculture Organization of the United Nations (FAO)

56. Gender equality and women's empowerment are central to FAO's work on eradicating hunger and poverty. FAO is the custodian agency for 21 SDG indicators, across SDGs 2, 5, 6, 12, 14 and 15, and a contributing agency for six more. Specifically in relation to goal 5, it is the custodian for indicators 5.a.1 (a) (percentage of people with ownership or secure rights over agricultural land (out of total agricultural population), by sex); 5.a.1 (b) (share of women among owners or rights-bearers of agricultural land, by type of tenure); and 5.a.2 (percentage of countries where the legal framework (including customary law) guarantees women's equal rights to land ownership and/or control).³²

²⁸ <http://www.oecd.org/gender/resources/>

²⁹ Available from <http://www.oecd.org/gov/2015-oecd-recommendation-of-the-council-on-gender-equality-in-public-life-9789264252820-en.htm>

³⁰ <http://www.oecd.org/gender/data/>

³¹ Available from: <http://www.oecd.org/gender/the-pursuit-of-gender-equality-9789264281318-en.htm>

³² www.fao.org/sustainable-development-goals/en/

57. The methodology for indicator 5.a.1 is based on the UN Methodological Guidelines on the Production of Statistics on Asset Ownership from a Gender Perspective, developed as part of the EDGE project. FAO is working alongside partner agencies, in particular the custodian agencies for SDG indicator 1.4.2 concerned with secure land tenure rights, to ensure harmonization of the methodology of these two indicators and to develop a survey module that would permit collection of data for both indicators, which could be incorporated into internationally-sponsored surveys.

58. FAO's regional office for Europe and Central Asia has developed an *Agri-Gender Statistics Toolkit*³³, launched in 2016, which supports the production and use of sex-disaggregated agricultural data. As part of this effort it has implemented its *Gender and Agricultural Statistics Framework* in Tajikistan, Kyrgyzstan and Turkey. The Toolkit includes a unified methodology to guide the collection and analysis of gender-sensitive agricultural data, called the Socio-Economic and Gender Analysis Approach. A Core Set of Gender Indicators in Agriculture forms an important part of the Toolkit.

59. FAO provides technical assistance to countries to collect and use gender-sensitive agricultural statistics: for example, it has supported the agricultural census in Tajikistan and Georgia, and has aided Kazakhstan in the analysis of time use surveys.

8. United Nations Population Fund (UNFPA)³⁴

60. For more than 30 years, UNFPA has advocated for women and girls, promoting legal and policy reforms and gender-sensitive data collection, and supporting initiatives that improve women's health and expand their choices in life. It is one of the main UN agencies that works to promote gender equality and women's empowerment.

61. UNFPA works with governments, partners and other UN agencies to directly tackle many of the Sustainable Development Goals, in particular goal 3 on health, goal 4 on education and goal 5 on gender equality. It supports policies and programmes that promote gender equality at all levels; collaborates with partners around the world to eliminate child marriage; and works closely with partners, including men and boys, to fight gender-based violence.³⁵

62. UNFPA is a custodian or partner agency for the SDG indicators on violence against women and girls, early and child marriage, female genital mutilation/cutting, informed decision-making on sexual and reproductive health and care, and laws and regulations for access to sexual and reproductive health care, information and education. For the latter two of these, in particular (SDG indicators 5.6.1 and 5.6.2), UNFPA is leading the development of methodology and standards and piloting data collection to produce the indicators.

63. In the Eastern Europe and Central Asia region, UNFPA's work on gender statistics has included: supporting the Interstate Statistical Committee of the Commonwealth of Independent States (CIS-Stat) to publish information on Women and Men in Turkey and CIS countries on the basis of national data; supporting UNECE initiatives on gender statistics; contributing to the development of guidelines; supporting countries in fielding the Generations and Gender Survey.

9. European Institute for Gender Equality (EIGE)³⁶

64. EIGE is an autonomous body of the European Union, established to contribute to and strengthen the promotion of gender equality, including gender mainstreaming in all EU

³³ Available from: <http://www.fao.org/3/a-i5769e.pdf>

³⁴ <http://www.unfpa.org/gender-equality>

³⁵ <http://www.unfpa.org/sdg>

³⁶ <http://eige.europa.eu/>

policies and the resulting national policies, and to combat discrimination based on sex, as well as to raise EU citizens' awareness of gender equality.

65. One of its strategic objectives is to provide high quality research and data to support better-informed and evidence-based decision-making by policymakers and other key stakeholders working to achieve gender equality.

66. EIGE plays a key role in supporting the development of gender statistic in the region. It focuses on the collection, harmonization, analysis and use of gender statistics through the European Gender Equality Index (a composite indicator that measures gender gaps between women and men) and the European Gender Statistics Database (a useful tool that can be used to find reliable, comparable and up-to-date information on equality between women and men).

67. It created EuroGender³⁷, an information exchange platform for online cooperation and consultation that facilitates virtual teams to work, share knowledge and contribute to advancing gender equality. The platform also promotes events related to gender and interaction with experts and organizations, among others.

68. EIGE develops guidelines on data quality in gender statistics production. It has developed its own approach to Good Practices, including a set of basic criteria for the identification of practices with potential, and is applying the same methodology for the identification and dissemination of good practices in all selected areas. The aim of the project is to build capacity of Member States for effective implementation of gender mainstreaming strategies and gender equality policies.³⁸

69. EIGE works for a Europe free of gender violence and provides access to data and information on existing gender violence statistics, with the aim of supporting institutions and experts committed to prevention and to fighting against gender violence in the European Union and beyond.

10. World Bank

70. The World Bank is a long-standing participant in the area of gender statistics. It has in the past partnered with UNECE in a project for mainstreaming gender into national statistical systems, involving the development of training videos, delivery of training workshops, and the development of the 2010 manual, *Developing Gender Statistics: a Practical Tool*.

71. The Bank Group launched a new Gender Equality Strategy in 2016, which placed a greater emphasis on increased quantity and quality of gender data. In this context, several of its initiatives support efforts to fill gender data gaps.

72. The World Bank works in collaboration with UN Women and UNSD in the EDGE project, focusing on data approaches to track gender gaps in asset ownership and assisting countries to apply the EDGE methodology in new surveys.

73. The World Bank is working with UN Women to explore the possibility of jointly monitoring indicator 5.1.1 of the SDGs (whether or not there are legal frameworks to promote, enforce and monitor equality and non-discrimination on the basis of sex).

74. In 2016, it launched a project on Women, Business and the Law, a project that collects data on laws and regulations that constrain entrepreneurship, women's employment and economic participation.

³⁷ <http://eurogender.eige.europa.eu/>

³⁸ <http://eige.europa.eu/gender-statistics/dgs>

75. The World Bank is an important producer and disseminator of data. It developed a project to support Armenia in the implementation of the Living Standards Measurement Study in 2017, and another to support the first EU-SILC survey in Kosovo. It also developed a project to promote evidence-based policy formulation in Kosovo in key areas such as informal employment, poverty, social inclusion, health, social protection and dialogue between users and producers in these areas.

76. The Global Findex database, the world's most comprehensive database on financial inclusion, provides in-depth data on how individuals save, borrow, make payments, and manage risks. The World Bank collaborates with the Global Banking Alliance and UN Women to develop mechanisms for central banks to report data on financial assets disaggregated by sex.

77. The Gender Data Portal allows users to access gender data time series, search for indicators, create queries or download all gender indicators; explore country and thematic dashboards on gender equality indicators; obtain tools for data visualization and analysis; search for household surveys and censuses with topics of interest in the survey catalogue; learn about availability of gender data and efforts of the World Bank Group to fill data gaps; explore guidelines, manuals and training materials; download gender statistics publications; and view data and resources of the World Bank and other agencies.³⁹

11. International Monetary Fund (IMF)⁴⁰

78. The IMF recognizes women's empowerment as essential for economic growth and prosperity, and as such it is committed to promoting gender equality. Analysis and policy advice and programming – on such diverse topics as female labour force participation, financial inclusion, gender budgeting, the economic impacts of discriminatory laws, and bank stability associated with gender balanced leadership – depend upon gender statistics. A 2015 pilot survey on access to finance, for example, highlighted the necessity of sex-disaggregation to permit gender-sensitive analysis.⁴¹

79. The IMF DataMapper tool⁴² uses two gender equality datasets, on gender budgeting and on Gender Equality Indices. These allow users to map national gender budgeting initiatives and multidimensional composite indices of gender equality.

12. United Nations Children's Fund (UNICEF)⁴³

80. UNICEF's mission is to advocate for the protection of children's rights, to help meet their basic needs and to expand their opportunities to reach their full potential. UNICEF aims, through its country programmes, to promote the equal rights of girls and women and to support their full participation in the social, political and economic development of their communities.

81. UNICEF recognizes the human rights principles of equality and non-discrimination as central to the consideration of gender equality and believes that gender-based discrimination is one of the most ubiquitous forms of discrimination that children face. The organization promotes equal outcomes for girls and boys, and its policies, programmes, partnerships and advocacy efforts seek to contribute to poverty reduction and the achievement of the Sustainable Development Goals (SDGs) through result-oriented, effective, innovative and well-coordinated action that achieves the protection, survival and

³⁹ <https://data.worldbank.org/data-catalog/gender-statistics>

⁴⁰ <http://www.imf.org/external/themes/gender/>

⁴¹ See 'Gender Note' on <http://data.imf.org/?sk=E5DCAB7E-A5CA-4892-A6EA-598B5463A34C&slid=1460040555909>

⁴² Available from: <http://www.imf.org/external/datamapper/datasets/GID>

⁴³ https://www.unicef.org/gender/gender_57317.html

development of girls and boys on an equal basis. The organization seeks to engage boys and men in transforming gender relations towards more gender-equal societies. UNICEF strives to mainstream gender equality in all of its work, with the Convention on the Rights of the Child (CRC) as a principal reference, and the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) as the other important underpinning of the organization's mandate and mission.

82. UNICEF's activities in the area of gender statistics include supporting the Multiple Indicator Cluster Survey programme (MICS), an international Household Survey Programme, to produce, analyze and disseminate data for monitoring the well-being of children, women and households, focusing on topics including health, education, child protection, water and sanitation, rights and protection.

83. UNICEF's commitment to gender statistics is evidenced by their 2016 publication, *Harnessing the Power of Data for Girls: Taking stock and looking ahead to 2030*⁴⁴, which explains the importance of gender statistics with specific reference to achieving the SDGs; gives an overview of data availability; and highlights particular gaps in data quality and collection methods; measurement standards and concepts. It highlights in particular the need for methodological work on child labour, menstrual hygiene management and mental health.

84. UNICEF is a sole or joint custodian agency for the SDG indicators on violence against women and girls; child marriage; female genital mutilation/cutting. It is also involved in technical leadership and/or capacity development work related to the indicators on under-five mortality by sex; education facilities and menstrual hygiene management; and the gender burden of water collection.

85. UNICEF's Europe and Central Asia Regional Office also hosts the TransMonEE (Transition Monitoring in Eastern Europe) database⁴⁵, which collates and disseminates data from NSOs, some of which is sex-disaggregated and/or gender-relevant.

13. World Health Organization (WHO)⁴⁶

86. WHO considers gender as an issue cutting across all of its programmes and activities. Its gender policy commits to promoting gender equity in health, and its *Strategy for integrating gender analysis and actions into the work of WHO*⁴⁷ defines strategic actions to achieve this, one of which is "promoting the use of sex-disaggregated data and gender analysis".

87. WHO is a custodian or partner agency for the SDG indicators relating to violence against women, early and child marriage and female genital mutilation/cutting. An inter-agency group is examining a range of issues relating to the measurement of intimate partner violence including data availability and quality, defining and measuring psychological violence, and measuring violence among older women.

88. In the WHO Europe region, recent activities related to gender statistics have been: developing a set of key indicators to monitor the Action Plan for Sexual and Reproductive Health; supporting development of a set of global key indicators on gender and health; preparing a report on women's health and well-being, which provided evidence for the Strategy on women's health and well-being in the WHO European Region adopted by the Regional Committee; developing a monitoring framework for the strategy on women's

⁴⁴ Available from: <https://www.unicef.org/gender/files/Harnessing-the-Power-of-Data-for-Girls-Brochure-2016-1-1.pdf>

⁴⁵ <http://transmonce.org/>

⁴⁶ <http://www.who.int/mediacentre/factsheets/fs403/en/>

⁴⁷ Available from: <http://www.who.int/gender-equity-rights/knowledge/9789241597708/en/>

health and well-being in the following settings: SDGs, Health 2020 and the Global Strategy for Women's, Children's and Adolescents' Health.

14. United Nations Development Programme (UNDP)

89. UNDP is the lead United Nations agency in the field of development. The promotion of gender equality and the women's empowerment are core aspects of the UNDP mandate and are integrated into its development approach. This effort includes the promotion of equal rights for women and girls, fighting against discriminatory practices and challenging roles and stereotypes that serve as a foundation for inequalities and exclusion.⁴⁸ UNDP works in collaboration with partners within and beyond the United Nations system to promote gender equality and women's empowerment, with special attention to women and girls who face multiple forms of discrimination: ethnicity, disability, migratory or indigenous status.

90. UNDP participates actively in processes of international cooperation to improve the quality of data used for the creation of statistics on development, including gender statistics, since it relies on high-quality data for the computation of its flagship Human Development Index and the Gender Inequality Index.⁴⁹

15. UNESCO Institute for Statistics (UIS)

91. UIS is the leading source for, and the official custodian agency of, SDG indicators relating to education and literacy. UIS' sex-disaggregated and gender-relevant statistics help countries to assess and address gender gaps in education. UIS produces parity indices and develops new indicators to better reflect the equity and inclusion of girls and boys. UIS data show the educational pathways of girls and boys from pre-primary to tertiary education, with indicators on entry, participation, progression, completion and attainment in education, for example.

92. The UNESCO eAtlas for Education 2030⁵⁰ and the eAtlas of Gender Inequality in Education are part of a series of interactive tools⁵¹ providing a wide range of sex-disaggregated data and visualizations including maps, charts and detailed background information.

D. Issues and challenges

93. The topics requiring the most immediate attention in order to improve the availability of data for the goal 5 indicators are:

- (a) Time-use and unpaid work;
- (b) Violence against women.

94. Topics, which also merit further consideration in order to deepen the degree of gender mainstreaming throughout statistics include:

- (a) Economic statistics with a gender perspective;
- (b) Decision-making in the home.

⁴⁸ <http://www.undp.org/content/undp/es/home/ourwork/gender-equality/overview.html>

⁴⁹ <http://hdr.undp.org/en/content/gender-inequality-index-gii>

⁵⁰ Available from <https://www.tellmaps.com/sdg4/#1/topic/TARGETS>

⁵¹ Available from <https://tellmaps.com/uis/gender/#1/topic/GENDER>

95. It is necessary to evaluate the relevance of the proposed disaggregations for the SDG indicators, since the current availability of information, in general, seldom goes beyond the total national data.

E. Conclusions

96. The gender statistics activities carried out by the many institutions, organizations and projects outlined above focus on the following:

- (a) Developing guidelines, standards and methodologies for the preparation and monitoring of statistics relevant to gender. This is done with the interlinked aims of increasing the generation of statistical information with a gender perspective in different areas; improving the quality of the data generated; and enhancing international comparability;
- (b) Providing technical assistance for the production, availability, accessibility, analysis and use of gender statistics;
- (c) Making use of electronic means for dissemination, availability, access, use and above all understanding of gender statistics by different users;
- (d) Promoting inter-institutional collaboration on gender statistics at various levels;
- (e) Communication about gender equality and the importance of a gender perspective at the institutional level, as well as for populations in general;
- (f) Monitoring and collaborating on policies, initiatives and decision-making with a gender perspective.

F. Recommendations

97. While the foregoing sections show that progress has been made, and that the Sustainable Development Agenda has given a much-needed impetus to the continued development and promotion of gender statistics, gaps and areas for further development still remain. In light of the activities described above, it is considered that future activities should be framed as follows and undertaken by the international gender statistics community:

- (a) Continue the ongoing methodological work on the measurement of power and decision-making within households;
- (b) Review the gender-relevant SDG indicators currently classified at the global level as tier III, with the purpose of developing methodologies that would permit their reclassification to tiers II or I;
- (c) Obtain more detailed information on countries' capacities in the production and availability of SDG 5 indicators and other gender-relevant SDG indicators;
- (d) Establish measures to strengthen the gender perspective in information systems and in the statistical capabilities of NSOs, including the incorporation of a gender perspective into their dissemination and communication activities in general;
- (e) Relatedly, support improvements in the dissemination and communication of gender statistics more specifically, in order to make data accessible to users across all user groups, including policymakers and the general public, empowering them to use and interpret what they find;

(f) Reinforce efforts to develop new topics for statistics with a gender perspective, including those which go beyond the scope of the SDGs. It is important, for example, to consider addressing other issues such as gender identity, and to explore gender-related attitudes and their impact, since they represent subtle but pervasive aspects of gender inequality;

(g) Promote use of administrative records for the production of gender statistics.

III. Discussion and decisions by the CES Bureau

A. In-depth review discussion

98. The following is an extract from the report of the CES Bureau meeting on 10–11 October 2017 (ECE/CES/BUR/2017/OCT/23):

(a) “Gender statistics remains of high interest to countries. It is a challenging area that creates a need for strong partnerships due to its cross-cutting nature and diversity of topics covered;

(b) The changing and often politically sensitive landscape of gender and gender identity in public discourse can lead to competing pressures: on one hand to produce more sex-disaggregated data, and on the other hand to avoid questions on sex and gender altogether;

(c) There was strong support for the main thematic priorities identified in the in-depth review paper, namely time-use surveys, unpaid work, and violence against women;

(d) The list of non-thematic priorities should include the use of new data sources and new technologies, especially in time-use surveys and household budget surveys.

(e) Efforts should focus on highlighting the merits of time-use surveys, the value of standardizing and harmonizing these surveys across countries, and the potential of modern tools and techniques for reducing the burden and cost. It would be useful to explore the reasons for resistance to conducting time-use surveys as part of NSOs’ standard portfolios, and how such resistance could be reduced;

(f) Future work must build on what has already been done on time-use surveys in UNECE and other organizations. The work should align with and not duplicate current work in UNSD, UN Women, and the Inter-Agency and Expert Group on Gender Statistics;

(g) OECD, Eurostat and IMF will provide further information for the section of the review dealing with activities of international organizations in gender statistics.”

99. It was decided that Mexico, with the help of UNECE, would incorporate additional inputs from international organizations into the paper; and that the paper should be shared with the UNECE Steering Group on Gender Statistics and the participants of the UNECE Work Session on Gender Statistics in November, to propose areas for focus within the agreed-upon priority areas.

B. Outcomes and follow-up work

100. The discussions by the CES Bureau, the Steering Group on Gender Statistics, and the participants in the 2017 Work Session on Gender Statistics⁵² led to the following conclusions:

(a) The impetus and attention provided by the 2030 Agenda for Sustainable Development is valuable, but care must be taken that this attention does not narrow the focus of gender statistics to only those indicators included in the SDG indicator framework;

(b) Much of the methodological and conceptual development work for those indicators falling within the scope of SDG 5 is well taken-care of under the stewardship of custodian agencies and other organizations. The methodological development of time-use surveys is being advanced by both Eurostat and UNSD;

(c) The most notable outstanding area requiring further development and attention from the international community is communication and, relatedly, use and interpretation of gender statistics. The Work Session on Gender Statistics highlighted the potential for a positively reinforcing relationship between demonstrable use of gender statistics for developing or evaluating policies, and support for enhancing data collection and statistical production. That is, NSOs are more likely to undertake the challenging and expensive surveys necessary for producing rich gender statistics if they can see evidence of their value to users. In turn, to improve the value to users, statistical findings must be visible, comprehensible and usable;

(d) There are considerable challenges for statistics posed by diverse, dynamic and often emotive political and public debates on gender issues, including gender identity.

101. In view of these conclusions, the following areas for further work were agreed upon by the CES Bureau at its February 2018 meeting:

(a) Establishment of a new Task Force on Communication of Gender Statistics, overseen by the Steering Group on Gender Statistics;

(b) An in-depth review on measuring gender identity, to be co-led by Canada and the United Kingdom, to report to the Bureau in February 2019.

⁵² Report of the Work Session ECE/CES/GE.30/2017/2

Annex

Tier Classification for Global SDG Indicators for Goal 5 (as of December 2017)^{a)}

Target	Indicator	Initial Proposed Tier Possible (by)		Updated Tier Classification (by) Notes (including timing of review and explanation for change in Tier)	
		Secretariat	Agency/ies	Partner Agency/ies	IAEG-SDG Members
5.1 End all forms of discrimination against all women and girls everywhere	5.1.1 Whether or not legal frameworks are in place to promote, enforce and monitor equality and non-discrimination on the basis of sex	Tier III	UN Women, World Bank, OECD	OHCHR	Tier III
	5.2.1 Proportion of ever-partnered women and girls aged 15 years and older subjected to physical, sexual or psychological violence by a current or former intimate partner in the previous 12 months, by form of violence and by age	Tier II	UNICEF, UN Women, UNFPA, WHO, UNODC	UNSD, UNDP	Tier II
5.2 Eliminate all forms of violence against all women and girls in the public and private spheres, including trafficking and sexual and other types of exploitation	5.2.2 Proportion of women and girls aged 15 years and older subjected to sexual violence by persons other than an intimate partner in the previous 12 months, by age and place of occurrence	Tier II	UNICEF, UN Women, UNFPA, WHO, UNODC	UNSD, UNDP	Tier II
	5.3.1 Proportion of women aged 20–24 years who were married or in a union before age 15 and before age 18	Tier I	UNICEF	WHO, UNFPA, UN Women, DESA Population Division	Tier II
5.3 Eliminate all harmful practices, such as child, early and forced marriage and female genital mutilation	5.3.2 Proportion of girls and women aged 15–49 years who have undergone female genital mutilation cutting, by age	Tier I	UNICEF	UNFPA, WHO	Tier II
					IAEG-SDG 3rd meeting: Lack of sufficient data coverage (classified as Tier II) IAEG-SDG 3rd meeting: Lack of sufficient data coverage (classified as Tier II)

a) Source: https://unstats.un.org/sdgs/files/Tier%20Classification%20of%20SDG%20Indicators_15%20Dec%202017_web%20final.xlsx

Target	Indicator	Initial		Proposed Tier		Updated Tier	
		by	Sector(s)	Possible Agency(ies)	Custodian Agency(ies)	Classification (by Notes)	
						IAEG-SDG Members	(including timing of review and explanation for change in Tier)
5.4 Recognize and value unpaid care and domestic work through the provision location of public services, infrastructure and social protection policies and the promotion of shared responsibility within the household and the family as nationally appropriate	5.4.1 Proportion of time spent on unpaid domestic and care work, by sex, age and location			UNSD, UN Women		Tier II	
5.5 Ensure women's full and effective participation in decision-making in political, economic and public life	5.5.1 Proportion of seats held by women in (a) national parliaments and (b) local governments			IPU, UN Women	World Bank	Tier I (a) Tier II (b)	Reviewed at 6th IAFG-SDG meeting (part (b) classified as Tier II)
	5.5.2 Proportion of women in managerial positions	Tier I		ILO		Tier I	
5.6 Ensure universal access to sexual and reproductive health and reproductive rights as agreed in accordance with the Programme of Action of the International Conference on Population and Development and the Beijing Platform for Action	5.6.1 Proportion of women aged 15-49 years who make their own informed decisions regarding sexual relations, contraceptive use and reproductive health care	Tier III		UNFPA	UN Women	Tier II	IAFG-SDG 3rd meeting: There is an established methodology for the indicator (classified as Tier II)
	5.6.2 Number of countries with laws and equal regulations that guarantee full and equal access to women and men aged 15 years and older to sexual and reproductive health care, information and education and the outcome documents of their review conferences	Tier III		UNFPA	UN Women, DESA Population Division, WHO	Tier III	UNSC 48 Refinement, Reviewed at 5th IAFG-SDG meeting: Internationally agreed methodology and standard to be developed (indicator in piloting stage of methodology development) (classified as Tier III)

Target	Indicator	Initial Proposed Tier Possible (by)		Partner Agency(ies)	Updated Tier Classification by Notes IAEG-SDG Members		Including timing of review and explanation for change in Tier
		Secretariat	Agency(ies)		Members		
5.a Undertake reforms to give women equal rights to economic resources, as well as access to ownership and control over land and other forms of property, financial services, inheritance and natural resources, in accordance with national laws	5.a.1 (a) Proportion of total agricultural population with ownership or secure rights over agricultural land, by sex; and (b) share of women among owners or rights-bearers of agricultural land, by type of tenure	Tier III	FAO	UN Women, UNSD, UNFIP, World Bank, UN-Habitat	Tier II	Fast Track: Reviewed at 5th IAE-G-SDG meeting (classified as Tier II)	
5.b Enhance the use of enabling technology, in particular information and communications technology, to promote the empowerment of women	5.b.1 Proportion of countries where the legal framework (including customary law) guarantees women's equal rights to land ownership and/or control	Tier III	FAO	World Bank, UN Women	Tier II	Reviewed at 6th IAE-G-SDG meeting (classified as Tier II)	
5.c Adopt and strengthen sound policies and enforceable legislation for the promotion of gender equality and the empowerment of all women and girls at all levels	5.c.1 Proportion of individuals who own a mobile telephone, by sex	Tier II	IHU		Tier I	IAEG-SDG 3rd meeting: There is broad, global data coverage for this indicator (classified as Tier I)	
	5.c.1 Proportion of countries with systems to track and make public allocations for gender equality and women's empowerment	Tier III	UN Women, OECD		Tier II	Reviewed at 6th IAE-G-SDG meeting (classified as Tier II)	



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**Outcomes of in-depth reviews carried out by the Bureau of the Conference
of European Statisticians in October 2017 and February 2018**

In-depth review of measuring social exclusion

**Note by Statistics Canada and the National Institute of Statistics and
Geography of Mexico**

Summary

The document is an updated version of the in-depth review paper on social exclusion that the Bureau of the Conference of European Statisticians discussed in February 2018. The document takes into account additional information received through the review and the outcome of the Bureau discussion.

This in-depth review examines the concept of social exclusion and the differences in methods national statistical offices use to measure social exclusion. The note summarizes international activities related to measuring social exclusion, and identifies issues and challenges. The last section summarises the discussion and decision by the Bureau in February 2018.

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Contents

<i>Chapter</i>	<i>Page</i>
I. Background	3
II. Introduction	3
III. Scope/definition of the statistical area covered	3
A. Concepts	4
B. Capabilities model	5
IV. Overview of international statistical activities in the area	5
A. Eurostat	5
B. Economic Commission for Latin America and the Caribbean	5
C. United Nations Development Programme	6
V. Country practices	6
A. Armenia	6
B. Australia	7
C. Canada	7
D. Ireland	8
E. Mexico	8
F. United Kingdom	9
VI. Issues and challenges	10
A. No concrete definition	10
B. No clear measurement standards	10
C. NSOs chose what measure as it relates to their mandates and their resources	10
D. Competition from other multidimensional measurements	10
VII. Conclusions and recommendations by the authors of the in-depth review paper....	11
A. Conclusions	11
B. Recommendations for future work	11
1. Clearly define social exclusion	11
2. Examine methodologies to measure social exclusion	11
VIII. Discussion and decision by the CES Bureau	12
IX. Acknowledgements	13
References	13

I. Background

1. This review examines the concept of social exclusion and the differences in methods National Statistical Offices (NSOs) use to measure social exclusion. To be socially excluded is to be limited in one's ability to fully participate in society. These limitations can arise from physical characteristics, limited access to material and/or social resources, poor health, generational inequalities, a denial of rights or other sources.
2. Part of the debate is whether or not low income is an important concept in the measurement of social exclusion, or if it is rather a symptom of someone who is already excluded. Many of the NSOs who were examined in this paper use low income as part of their measurement of social exclusion but do not include it in their definition of what social exclusion is.
3. Another area of difference is whether belonging to a workless, or underworked, family can make the household social excluded. Some NSOs include workless or underworked in their index, due to the premise that they have a limited social network compared to people who are employed.
4. The methodology used to examine social exclusion varies by NSO. Many countries in the review have experimented with a national material deprivation index, although not all are active. Eurostat, Mexico, and to some extent, the United Kingdom and Ireland all use indexes to measure social exclusion, while Economic Commission for Latin America and the Caribbean (ECLAC), Canada, and Australia use numerous indicators. The various methodological methods do not allow for easy cross country comparisons, with the exception of European Union (EU) member states participating in the European Union Statistics on Income and Living Conditions survey (EU-SILC).

II. Introduction

5. The Bureau of the Conference of European Statisticians (CES) regularly reviews selected statistical areas in depth. The aim of the reviews is to improve coordination of statistical activities in the UNECE region, identify gaps or duplication of work, and address emerging issues. The review focuses on strategic issues and highlights concerns of statistical offices of both a conceptual and a coordinating nature. The current paper provides the basis for the review by summarising the international statistical activities in the selected area, identifying issues and problems, and making recommendations on possible follow-up actions.
6. The CES Bureau selected social exclusion for an in-depth review for its February 2018 meeting. Statistics Canada, with the assistance of the National Institute of Statistics and Geography of Mexico (INEGI), was requested to prepare the paper providing the main basis for the review.

III. Scope/definition of the statistical area covered

7. To be socially excluded is to be limited in one's ability to fully participate in society. These limitations can arise from physical characteristics, limited access to material and/or social resources, poor health, generational inequalities, a denial of rights or other sources.
8. The study of social exclusion generally focuses on the inequality of opportunity of individuals rather than the inequality of outcomes (OECD, 2017). A person who faces social exclusion is less likely to be promoted or to get adequate public services in their communities to deal with their health or educational needs, due to their societal position (OECD, 2017). Social exclusion also contributes to a lower sense of self-worth (OECD,

2017). Many of the problems associated with social exclusion are large systemic problems that exist in all societies (UNECE, 2017).

9. The extent to which social exclusion is a problem in society is hard to measure because it is difficult to quantify the number of people who face social exclusion, or the degree to which people are at risk of social exclusion. As well, very few surveys or statistical methods are exclusively designed to measure social exclusion. Therefore, most numeric measurements of social exclusion rely heavily on methods that measure material and social deprivation, and then interpret an individual's level of social exclusion.

A. Concepts

10. The concept of social exclusion is linked with that of poverty, and disentangling them is conceptually difficult (Levitas, 2006). The study of poverty tends to focus on the limitations a person has due to lack of resources – their low income, poor living conditions, and/or debts they acquired. The study of poverty therefore is more closely linked to outcomes, rather than deprivations or disadvantages that limit participation. Nevertheless, income poverty may be listed among the deprivations underlying social exclusion, and conversely some definitions of poverty include aspects of social exclusion (Levitas, 2006).

11. Social exclusion is generally discussed within the social cohesion and social inclusion framework. Social cohesion and social inclusion are often used as synonyms, however there are important differences between the two. Both focus on the importance of community but view it in different terms. Social cohesion focuses on the personal feelings and satisfaction of feeling like a person belongs as a member of society, whereas social inclusion looks at the non-psychological benefits of being a participatory member of society (I.C.L.A.C, 2007a).

12. On the other side of the spectrum is the definition social exclusion, the direct antonym of social inclusion, and it can be rather ambiguous, as it is often defined by what it is not than by what it is (Behrman et al. 2002). Many people cannot define social exclusion, but can provide examples because “(they) know it when they see it” (Behrman et al. 2002, pg. 10). Social exclusion has been described as a “chameleon like concept whose meaning can be stretched in numerous, even conflicting, directions” (Daly, 2010, pg. 145) and as “rarely clearly defined” (Levitas, 2006).

13. While social exclusion may have been given various interpretations, the interpretations have common strands. Social exclusion is most often linked with material deprivation (lacking material resources) or social deprivation (lacking social resources). However, people who face material and social deprivation are not the only types of people who are at risk for social exclusion. One study describes persons as socially excluded if the falls into one of the following groupings:

- (a) Faces some type of non-monetary deprivation;
- (b) Does not actively participate economically, socially, politically, or culturally;
- (c) Has a poor quality of life (Levitas et al. 2007, pg. 10).

14. Therefore, social exclusion is sometimes a symptom of a person's level of poverty, but the reason for a person's inability to actively participate in society could be due to one of the other factors listed above.

15. Additionally, social exclusion recognises that persons can be excluded in multiple dimensions. If a person can be described to be in more than one category, the person is thought to face a higher level of social exclusion than had they only been described in one category (Levitas et al. 2007).

B. Capabilities model

16. One of the better known social exclusion models is Amartya Sen's capabilities model. In *Development as Freedom*, Sen argues that social exclusion is a social justice issue that should concern everyone and that social exclusion, capabilities deprivation, and relative poverty are all synonymous with each other (Sen, 1999). In the book, Sen discusses the ideas behind his capabilities model, describing the history of economic justice theory and how social policy should focus on the limitations people face that prevent them from being full active members of society, instead of relying solely on income measures (Sen, 1999).

17. Others have since adopted Sen's capabilities approach as a framework to monitor social exclusion in societies. The NSOs in Denmark, Sweden, Finland and the United Kingdom use the capabilities normative approach when forming their multidimensional indicators (Duclos, 2011, pg. 32). Thus, changing the priorities of some NSOs from strictly measuring personal income levels to now measuring citizens' life satisfaction, access to services, material and social deprivation and environmental conditions (Duclos, 2011, pg. 33).

IV. Overview of international statistical activities in the area

A. Eurostat

18. In 2009, Eurostat began measuring the degree to which material deprivation affects citizens from across the EU (Guio et al, 2017). The 2017 revision of material deprivation variables focuses on 13 items, from the EU-SILC questionnaires that are provided to Eurostat by NSOs (Guio et al, 2017). This information is used to calculate the rate of deprivation, at a national level and EU level, as well as for different age ranges (Guio et al, 2017). Eurostat's material deprivation index is one of the three sub-indicators that are part of a larger indicator, At-risk of Poverty or Exclusion or AROPE (Eurostat, 2013, pg. 3).

19. AROPE is a synthetic indicator based on three sub-indicators. One is material deprivation, which refers to the inability for individuals or households to afford those consumption goods and activities that are typical in a society at a given point in time, irrespective of people's preferences with respect to these items. One of the other, the monetary poverty, is based on a poverty threshold set at 60 per cent of national median equivalized disposable income. The last component of the AROPE regards those who are largely excluded from the labour market i.e. "persons living in households with low work intensity". The inclusion of the labour market indicator is due in part to the idea that working provides workers social relations they would not have if they were unemployed. People who are present in more than one of the sub-indicators are only counted once as being social excluded, even though they are experiencing social exclusion from various perspectives (Eurostat, 2013, pg. 4).

B. Economic Commission for Latin America and the Caribbean

20. ECLAC uses a variety of indicators to measure social exclusion and social cohesion within and across Latin American countries. The ECLAC uses the International Labour Organization's (ILO) long-term unemployed and underemployed as indicators for social exclusion (ECLAC, 2007b). The ECLAC argues the underemployed and long-term unemployed face potential poverty if they have no savings, as well as not having the type of social network one may have if in a permanent position, contributing to their potential social exclusion (ECLAC, 2007b).

21. Other indicators the ECLAC uses for measuring social exclusion and social cohesion include the GINI¹ index and the income quintile ratio, to measure the variation in salaries among citizens (ECLAC, 2007b). They also measure the percentage of people contributing to government welfare programs through taxation, as these programs are smaller in Latin American countries compared to Europe and therefore their success rate should be dependent on size (ECLAC, 2007b).

22. For health indicators, the ECLAC measures the infant mortality rate as well as the HIV mortality rate among 1,000 citizens (ECLAC, 2007b). Finally, they measure different types of education rates, including the amount of children in pre-primary programs, enrolment rates for school-aged children, and adult literacy rates (ECLAC, 2007b).

C. United Nations Development Programme

23. The United Nations Development Programme (UNDP) established a Social Exclusion Index (a) to promote multidimensional measurement, (b) to complement material deprivations in a broad sense with access to social services and civic and political participation, and (c) to focus on individual situation rather than “excluded groups”, as the latter are internally heterogeneous (UNDP, 2011).

24. The Index was created to measure social exclusion in Eastern Europe: (i) to promote multidimensional measurement; (ii) to complement material deprivations (in a broad sense) with access to social services and civic and political participation; and (iii) to focus on individual situation rather than “excluded groups”, as they are internally heterogeneous. The index consists of 24 indicators: 8 indicators for each of the following 3 dimensions: economic life, social services, and social networks and civic participation. A person is considered to be socially excluded if he or she is classified as deprived of nine of the established indicators (UNDP, 2011). If a person is deprived in more than one dimension they are viewed as suffering from a deeper level of exclusion (UNDP, 2011).

25. More detailed comments from UNDP on social exclusion are available in document ECE/CES/BUR/2018/FEB/2/Add.1².

V. Country practices

A. Armenia

26. Social exclusion was one of the focus areas of an EU twinning project implemented in the National Statistical Service of the Republic of Armenia (NSSRA) in 2015-2017. The project was implemented by Statistics Denmark (lead) in cooperation with Statistics Finland, Statistics Italy (Istat) and Statistics Lithuania, and with the support of the European Union.

27. As a result of the project, statistics on social exclusion were introduced and are now calculated. A questionnaire with 26 questions related to social exclusion has been developed. It was used in the pilot survey in October 2015. Test results turned out to be of a very good quality. The questionnaire has been integrated into the regular Integrated Living Conditions Survey (ILCS) and data has been collected throughout 2016 and 2017. The results of ILCS conducted in 2016, including the Social exclusion module, have been published in the *Social snapshot and poverty in Armenia, 2017*.

¹ The Gini coefficient is a measure of statistical dispersion used to represent the income or wealth distribution of a country's residents.

² Available at <http://www.unecce.org/index.php?id=47409>

28. More detail on the results of the project is provided in document ECE/CES/BUR/2018/FEB/2/Add.3³.

B. Australia

29. The Australian government created the Australian Social Inclusion Board to measure to the extent which social exclusion affects her citizens, and how different policy changes increase or decrease social exclusion within the country (McDonald, 2011). The main goals of the board is to measure Australians participation in civil society based on their socio-economic standing, marital status, race, gender and their employment status, as well as the effect these statuses have on their children (McDonald, 2011).

30. The Australian Social Inclusion Board publishes two indexes that measure different dimensions of social exclusion, using data provided by the Australian Bureau of Statistics (ABS). The first index, "People in Households with Low Economic Resources and High Financial Stress", uses data from the Household Expenditure Survey on the bottom 30% of the income distribution and whether people reported five or more financial stresses out of a possible 15 in the past 12 months (Australian Social Inclusion Board, 2012, p. 28).

31. The second index, "Proportion of People 18 to 65 Experiencing Three or More Disadvantages" calculates the percentage of Australians who face social deprivation through six categories through data collected by the ABS General Social Survey (Australian Social Inclusion Board, 2012, p. 23). The categories of focus include those who are 'low income, not working, in poor health, low education, feeling unsafe and report low levels of support' (Australian Social Inclusion Board, 2012, p. 23).

C. Canada

32. Up to 2017, Canada's approach to social exclusion has been through its provinces' anti-poverty programs (Fortin & Gauthier, 2011). As Statistics Canada does not have a particular survey that measures social exclusion, several Canadian provinces constructed their own individual "dashboards" to measure deprivation based on information provided by different Statistics Canada surveys. A "dashboard" is a series or compendium of related indicators which can be used together or separately to describe a common phenomenon or concept.

33. The dashboards are created by first specifying what multidimensional poverty is. Second, by deciding on indicators they think best represents the type of deprivations people in their provinces face. They may choose to either use available data, or create a new survey to gather data in monitoring progress of decreasing multidimensional poverty, depending on their own definition. Possible indicators include low income, material deprivation indexes, employment statistics, education statistics, health statistics and quality of life and neighbourhood satisfaction statistics (Fortin & Gauthier, 2011).

34. In 2009 exclusively, the Canadian province of Ontario added the Ontario Material Deprivation Index (OMDI) to their wellbeing indicators as part of their Poverty Reduction Strategy (Statistics Canada, 2009). The OMDI was conducted by Statistics Canada for Ontario only (Statistics Canada, 2009). The OMDI separated the idea of deprivation and income and interpreted a person as being materially deprived if they reported not having two of 10 predetermined items (Statistics Canada, 2009).

³ Available at <http://www.unece.org/index.php?id=47409>

35. From 2009 to 2011, the national Survey of Labour and Income Dynamics (SLID) measured the same 10 possible material deprivations that were included in the OMDI for Ontario. These indicators were no longer available after the SLID was terminated in 2011.

36. In 2013 exclusively, Statistics Canada fielded the Canadian Survey of Economic Well-being (CSEW). The survey focused on material deprivation using 17 indicators to measure wellbeing, economic hardship, household income and personal income (Notten et al, forthcoming).

37. In 2017, Canada's federal department responsible for social policy announced a new national poverty reduction strategy for that country. The strategy was to underscore the multidimensional nature of poverty, reflecting the importance of health, housing, and food security in addition to income in promoting participation in society (Government of Canada, 2016).

D. Ireland

38. Ireland's "Consistent Poverty" measure is a combination of their material deprivation index and their risk of poverty line (Callan et al, 1993). Their material deprivation index contains 11 indicators, and their risk of poverty line is defined as 60% of median earnings (Callan et al, 1993). Unlike the general HBAI (the HBAI that does not look at specific subgroups) Consistent Poverty incorporates a material deprivation component into the indicator.

E. Mexico

39. In Mexico, there are no direct measures on social exclusion, nevertheless there are measurements of multidimensional poverty. The National Council for the Evaluation of Social Development Policy (CONEVAL⁴), a decentralized autonomous body created in 2004 with the approval of the General Law of Social Development (LGDS⁵), is the responsible institution for creating such measures. CONEVAL establishes one of its central objectives as

... to guarantee the full implementation of rights established in the Political Constitution of the United Mexican States, ensuring all the population has access to social development (LGDS, as quoted by CONEVAL, 2010, pg. 17).

40. The LGDS (2016) indicates the goals of the national policy of social development the promotion of conditions that ensures individual or collective social rights⁶, as well as the enhancement of economic development.

41. In this context, CONEVAL (2017) established the guidelines and criteria for defining, identifying and measuring "Multidimensional Poverty" in Mexico, as mandated in the LGDS, taking into consideration the following indicators:

- Per capita income;
- Average educational gap in the household;
- Access to health services;

⁴ Its Spanish acronym

⁵ Ibid

⁶ i.e.: education, health, nutritious and quality food, housing, healthy environment, work, social security and those related to the non-discrimination terms included in the Mexican Constitution

- Access to social security;
- Quality and spaces in the dwelling;
- Access to basic services in the dwelling;
- Access to nutritious and quality food;
- Degree of social cohesion;
- Degree of accessibility to paved road.

42. In order to measure the insufficiency in terms of economic well-being, people whose incomes are insufficient to obtain the goods and services required for the satisfaction of their needs are identified. For this purpose, CONEVAL defines a line of wellbeing "La Línea de Bienestar" and a line of minimum wellbeing "Línea de Bienestar Mínimo". "La Línea de Bienestar" considers the income required for the acquisition of goods and services to satisfy the food and non-food needs of the population. Conversely, the "La Línea de Bienestar Mínimo" focuses only on the amount required only for the satisfaction of food needs.

F. United Kingdom

43. The Households Below Average Income (HBAI) is the United Kingdom's low income line, which is composed from data from the Family Resources Survey (FRS) (Department of Work and Pensions, 2016). The HBAI is the basis for the country's measurement of social exclusion. It consists of two main low income lines which include the Before Housing Cost (BHC) line, and the After Housing Cost (AHC) line (Department of Work and Pensions, 2016).

44. People are defined as being low income if they have an income that is below 60% of the median found in the FRS (Department of Work and Pensions, 2016). In the context used by the United Kingdom, social exclusion is defined as having some type of relationship with income (Department of Work and Pensions, 2016). The HBAI also standardizes the amount of income needed by family type, using a two member adult family as the standard (Department of Work and Pensions, 2016).

45. After these lines are produced, there are many different lines for different parts of the population. There is a HBAI that calculates the different depths of social exclusion children 15 and under face who live below the HBAI, as well as a separate pensioner's index, for pensioners defined as those who are eligible or have legal or common law spouse who is eligible for a pension, HBAI (Department of Work and Pensions, 2016). Both calculations feature a material deprivation component (Department of Work and Pensions, 2016). To be clear, the UK HBAI for the general population does not include a material deprivation component, but the indexes for the subcategories, seniors and children, do.

46. The material deprivation index used in for HBAI is different than the one used in the EU-SILC, as the material deprivation index for children contains 21 items, and the material deprivation index for pensioners has 15 items (Department of Work and Pensions, 2016). The HBAI also defines children as those 15 and under, compared to the EU-SILC that defines children as those under the age of 18 (Department of Work and Pensions, 2016). Households and families that do not fall into one of the aforementioned groups do not have a material deprivation index calculated into their HBAI (Department of Work and Pensions, 2016).

VI. Issues and challenges

A. No concrete definition

47. Currently, there is no exact or widely accepted definition of what social exclusion is or is not, which makes it difficult to compare statistics from one source against statistics of another source. Some NSOs measure social exclusion with the addition of low income being a factor, while others do not include it, based on the view that low income is only a symptom of a person being excluded from society, and not the primary cause. With the exception of EU member countries that are measured using the EU-SILC, this large discrepancy in how NSOs define social exclusion makes cross country comparisons difficult.

48. This phenomenon extends to how employment is factored into the discussion of social exclusion. Some definitions of social exclusion dismiss the concept and its importance to measuring social exclusion entirely, while others believe that it is an essential part as it can examine the scope of social networks that can be exploited at work and creates a sense of community and belonging.

B. No clear measurement standards

49. These inconsistencies reflect the lack of current measurement standards on the topic across NSOs, with different NSOs creating their own methodologies that suit their own purposes. Different NSOs have tried either indexes or dashboard indicators, or both, in an attempt to measure the prevalence and depth of social exclusion. While none of these are inherently better methodologies of measuring social exclusion, it does make it difficult to compare how different groups are combatting social exclusion in their societies.

50. There has been movement towards conceptual and measurement standardization between NSOs in related subjects, although not always in a coordinated way. Now, many NSOs are likely to produce (or have produced in the past) a material deprivation index that is unique to the needs of the residents in their nation(s). Likewise, low income indicators have become more standardised across countries over time. These, and other similar moves, allow for more discussion about how a country is progressing towards the goal of reducing social exclusion relative to other countries.

C. NSOs chose what measure as it relates to their mandates and their resources

51. NSOs do not have the ability to measure everything and therefore must make choices as to what they are able to measure and what they cannot, based on their country's priorities. These limitations can include smaller budgets compared to other NSOs, fewer staff members, and fewer other physical resources. The lack of resources NSOs face leads to international comparability being often overlooked for more immediate needs.

D. Competition from other multidimensional measurements

52. Differences in local capacities or interests result in NSOs choosing to measure different concepts. Distinctions between these concepts, like social exclusion, social cohesion, social inclusion, material deprivation or multidimensional poverty are relatively nuanced which can create confusion in their comparability, as well as make it difficult to measure each one individually.

VII. Conclusions and recommendations by the authors of the in-depth review paper

A. Conclusions

53. Social exclusion is a rather loosely defined concept that has generally been understood as a way to assess a person's material and social deprivation, their lack of involvement in society and having a poor quality of life. However, the ambiguity surrounding the term has led to confusion as to what is included and not included in measurements, as the methodology changes based on what definition is used.

54. Eurostat's AROPE, the United Kingdom's HBIA, Ireland's Consistent Poverty line, and INEGI (Mexico) use indexes to measure the variation of social exclusion in their society across years. However, there are underlying differences in the methodologies of these indexes. The United Kingdom's HBIA, EUROSTAT's AROPE and Ireland's consistent poverty line include people who have incomes below a certain threshold, while INEGI's does not. This is in spite of some definitions of social exclusion not including low income as a factor in social exclusion, rather a symptom.

55. Australia, Canada and ECLAC are examples of countries or organisations who have mostly focused on individual indicators or dashboards instead of creating social exclusion indexes.

56. The lack of a standardized definition and methodology has led to confusion as to what is actually represented in the statistics.

B. Recommendations for future work

57. This section on recommendations for future work is informed by the conclusions described above, as well as feedback received during consultations with representatives from multiple statistical organisations, as described in the acknowledgements.

1. Clearly define social exclusion

58. The purpose of this recommendation is to clearly define what constitutes social exclusion. As it currently stands, each NSO defines what social exclusion is in their country, and the standards can change over time. This fact makes comparisons across time, and across countries very difficult.

59. Feedback to this study generally indicated agreement with the idea that "social exclusion is an important topic for NSOs to collect data on", although there was concern expressed about the costs of adding additional measurements to existing surveys.

2. Examine methodologies to measure social exclusion

60. The second recommendation is to re-examine current practices in terms of measuring social exclusion. The objective would be to prioritize a statistical method as to measure the prevalence, persistence and depth of social exclusion.

61. Reviewers of this study had mixed views on whether social exclusion should be measured as a single index or as a "dashboard" of indicators. The latter allows for more flexibility among countries to customise the measure to meet domestic needs.

62. Some reviewers of this study indicated a preference for using EU-SILC as a source for international harmonisation, given the (already existing) application of these data in many country contexts.

63. One reviewer indicated that administrative data on income, government transfer programs, housing etc. could be exploited for indicators of social exclusion.

VIII. Discussion and decision by the CES Bureau

64. At its February 2018 meeting, the Bureau discussed social exclusion based on the in-depth review paper by Canada and Mexico, and notes by UNDP, UNECE and Armenia. The Bureau raised the following issues:

- The definitions of social exclusion and social cohesion should be clarified. Moreover, the concepts of exclusion and inclusion are changing over time. It would be useful to define a taxonomy of the different concepts covered by social exclusion.
- The concept of social exclusion is distinct from poverty and material deprivation. The population groups to which it pertains can sometimes be very far from each other. For example, both the very rich and the very poor can be socially excluded.
- Measurement of social exclusion should start from a general concept and framework. It requires disentangling issues such as how to set the thresholds, whether to include subjective assessments and whether to develop a composite indicator.
- Social exclusion strongly depends on the economic, cultural and policy context and its measurement can not be fully harmonised. The work should rather aim at collecting and systematising country experiences on measuring different aspects of social exclusion, and linking them to SDG indicators.
- The life-course perspective is very important for measuring and understanding social exclusion. A collection of such case studies would be useful.
- There is high demand for data in support of policies that tackle social exclusion. Many countries and OECD have inclusive growth and non-exclusiveness on their policy agenda. To be relevant, any indicators on social exclusion should address policy questions from the start. Statisticians can give policy makers the tools to better understand this phenomenon.
- Communication of social exclusion measures is challenging. Most of the communication effort goes towards explaining the concepts.
- Methodological work in this area could be taken forward under the CES Steering Group on Measuring Poverty and Inequality.
- Further work could include development of a general framework for measuring social exclusion, defining concepts for statistical measurement, collecting case studies, and developing guidance on communicating such a complex issue. It would be desirable to involve academia in the group. Further work on this topic should consider SDG monitoring needs and involve the custodian agencies responsible for the SDG indicators related to social exclusion.
- Canada, Mexico, United Kingdom and Eurostat are willing to be part of this work. OECD would decide on its participation based on the terms of reference.

65. As a conclusion, the CES Bureau requested the UNECE Secretariat to prepare, together with the Steering Group on Measuring Poverty and Inequality, a proposal for follow up work to address the priority areas raised in the in-depth review for the next CES Bureau meeting.

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